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A

CONCISE TREATISE

ON THE

LAW OF WILLS.

MARCH, 1895.

A

CONCISE TREATISE
ON THE
LAW OF WILLS.

BY

H. S. THEOBALD,
OF THE INNER TEMPLE, ESQUIRE, BARRISTER-AT-LAW, AND
FORMERLY FELLOW OF WADHAM COLLEGE, OXFORD.

FOURTH EDITION.

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PREFACE TO THE FOURTH EDITION.

DURING the nine years which have elapsed since the last edition of this work, several statutes have been passed directly or indirectly affecting its subject-matter. The Married Women's Property Act, 1893, has placed married women on the same footing as men as regards testamentary capacity. The Mortmain and Charitable Uses Act, 1891, enables testators to give land to charity and puts an end to the contests which have been so frequent in the past as to what is or is not impure personalty. The Accumulations Act, 1892, imposes a further limit upon accumulation for the purchase of land. The Trust Investment Act, 1839, repealed and re-enacted by the Trustee Act, 1893, shortens the drafting of wills by giving statutory powers of investment. The Trustee Act, 1888, also repealed and re-enacted by the Trustee Act, 1893, confers other useful powers upon trustees.

As regards decision—the question whether the rule against perpetuities applies to legal remainders has been decided in the affirmative. The law with reference to gifts to illegitimate children remains in an unsatisfactory state.

Notwithstanding the frequent protests against the

citation of decisions upon the construction of wills, the number of reported cases hardly diminishes. The cases will be found noted down to March, 1895.

Some of the chapters have been recast with a view to a more logical arrangement. A new chapter has been added upon tenant for life and remainderman.

My friend and former pupil, Mr. Walter Ashburner, of the Chancery Bar, has assisted me throughout. I am also indebted to him for the revision of the proofs and the correction of the indexes.

7, NEW SQUARE,
March, 1895.

PREFACE TO THE FIRST EDITION.

THE fact that the last comprehensive treatise on the Construction of Wills is now fifteen years old, might alone be a sufficient justification of a new work on the subject. Whether it is a sufficient justification of the work now offered to the profession, experience alone can show. My object has been to produce something more compendious than Jarman's classical work—the scheme of which, involving the statement of cases at length, would now be very cumbersome, in consequence of the large accumulation of cases since the last edition of his work; and on the other hand, something more detailed and elaborate than Mr. Vaughan Hawkins' book. I may say at once that without Jarman's book, my own would probably never have been written. But I have throughout used his work rather as a guide than a key to the authorities. In details I have consulted Mr. Vaughan Hawkins only incidentally, though the general scheme of his book has served in the main as the model for my own.

The value of authority in questions of testamentary construction has so frequently been called in question

of late, that it may perhaps be allowable to say a few words as to the point of view from which the present work has been written.

No two wills are alike, it is said ; it is therefore useless to cite a decision upon one will as governing the interpretation of another ; one man's "nonsense" affords no clue to the meaning of another man's "nonsense."

Such expressions as these are very natural, and as a protest against hard and fast rules of construction, very valuable. The stream of English law is so continuous, and the mass of reported decisions so enormous, that very few points arise in practice upon which it is not possible to cite some more or less appropriate authority. Counsel, in their anxiety to omit nothing which may support their client's interests, overlay their argument with cases, the majority of which have no more than a superficial resemblance to the point in question. It is no wonder that judges, wearied with the citation of irrelevant cases, have sometimes gone so far as to object to the citation of cases upon the construction of wills altogether. And often the argument from authority is carried further. It is contended that there is some hard and fast rule which is to be applied regardless of the words of the will and the intention of the testator. The assumption of rules of construction in this sense is an almost unmixed evil. It tends to divorce law from common sense, and to reduce it to a set of technicalities which none but the initiated can understand. Unfortunately this point of view has not

been without its influence upon English law. The most striking instance of it is perhaps the doctrine of general and particular intention. As now interpreted in the sense that technical words must have their legal effect, this doctrine would be identical with the modern doctrine that a testator must mean what he has said, were it not for the survival of the older doctrine in the so-called rule in Shelley's case. In this application of it, the rule is not simply that technical words must have their legal effect, but that technical words must have their effect notwithstanding the strongest and clearest expression of intention on the part of the testator short of an express interpretation clause, that the words were not used technically. That a devise to a man for life with remainder to his heirs should give the ancestor the immediate fee, must always remain incomprehensible to common sense, however satisfactorily the learned may be able to trace the origin of the rule in a state of things long gone by. The rule in Shelley's case is in fact a disgrace to the rational spirit of English law, and it is to be hoped that it may soon be abolished by the Legislature, as it has long since been in America.

Another and more recent instance of an attempt to establish hard and fast rules of construction may be found in the rules laid down in *Edwards v. Edwards*. In all probability Lord Romilly only intended those rules to be convenient heads for arranging decided cases, and, so far as they accurately extracted the *ratio decidendi* of those cases, they were very valuable. But, in course of time, they came to have a value

independently of the cases upon which they were based, and there can be no doubt that the so-called fourth rule, which was laid down in terms more general than decided cases justified, came to be applied to new cases *ab extra* without much consideration of the language of the particular testator. The consequence was the sacrifice of the wishes of the individual to the certainty of the law; and had not a decision of the House of Lords intervened to reduce the rule within its proper limits, there would have been another instance of language meaning one thing to a layman and a totally different thing to a lawyer.

So far then it may be said there are no rules of construction but only decided cases. A testator can only mean what he has said, and his meaning is to be gathered by a careful study of the language he has used. On the other hand, admitting all this, it does not therefore follow that the construction of a will is to be left entirely to the discretion of the individual judge, unfettered by precedent or authority, though occasional dicta of judges might be cited in support of such a position.

The principles of law applicable to the construction of wills must be the same as those applicable to other matters.

Law is no more than the expression of the meaning of the acts of men in their relations with one another, when viewed by the most enlightened common sense of the day. There is no abstract law to be applied like a

foot rule to facts ; but law is the facts viewed in their natural bearings with reference to each other. It follows that, if the facts are the same, the same consequences ought to be deduced from them. The difficulty consists in discovering whether the facts are the same or not. In one sense, no doubt, the facts never are absolutely identical. There must at least be a difference of time, and this in itself, considering the continuous change in social life, is an important factor. But the question is not whether the facts are absolutely identical, but whether a fresh set of facts can be fairly distinguished from an earlier set. If not, judges have always considered themselves bound by the interpretation put upon such facts by their predecessors ; and when there have been repeated adjudications upon similar sets of facts, by a process of analysis and classification, rejecting immaterial distinctions and selecting essential points of similarity, what may be called a rule of law is established. But rules of law in this sense as distinguished from rules of policy, or from rules of law established by legislative enactment, only mean that the Courts have taken a particular view of a certain set of facts, and will do so again if similar facts arise. This process is inevitably subject to a twofold danger ; a strong judge will be more likely to distinguish cases ; he will look upon precedent as a guide and not as a master. A judge of a less independent spirit will dwell more upon resemblances ; he will be more anxious to shelter himself under authority. The inclination of the one to adapt the law to the changing conditions of life has the accompanying disadvantage of unsettling

it, while the other tends to make the law antiquated, though he leaves it certain.

No doubt in the case of wills there is this distinction. The facts here are the words employed by the testator, and since language is a much more adequate instrument for conveying subtleties of meaning than any other form of expression, the facts are of necessity exceedingly complex. It is more unlikely that undistinguishable sets of facts have already been adjudicated upon in the case of wills than in any other branch of law; but if they have been the subject of decision, a Court of co-ordinate jurisdiction is as much bound by those decisions in the cases of wills as in any other branch of law. The frequent dicta, therefore, to be found in the reports against citing cases upon the construction of wills only come to this, that it is useless to cite cases which have no application, and that in all probability the cases cited will be found to have none. Even with regard to this latter point it will not be safe to be too confident. Cases of construction are so numerous, originality even in "nonsense" is so rare, that there will nearly always be similar cases, or, at any rate, cases instructive even by their distinguishability.

The present work has been written from the point of view which I have thus endeavoured to indicate. Wherever the rules of construction are spoken of in the following pages, the meaning is, that certain words have received a particular interpretation by the Courts, and that words not reasonably distinguishable will receive the same interpretation when they occur again,

or, in other words, that certain rules of construction will prevail in the absence of an intention to the contrary. The rules of construction here discussed are, in fact, no more than a collection of arguments for or against the different constructions which may suggest themselves in the interpretation of the meaning of testators.

November, 1876.

CONTENTS.

	PAGE
TABLE OF CASES	xix
CHAPTER I.	
BY WHAT LOCAL LAW WILLS ARE REGULATED	i—9
CHAPTER II.	
GENERAL CHARACTERISTICS OF TESTAMENTARY INSTRUMENTS	10—13
CHAPTER III.	
TESTAMENTARY CAPACITY	14—20
CHAPTER IV.	
REQUISITES FOR A VALID WILL	21—31
CHAPTER V.	
ALTERATIONS, INTERLINEATIONS, AND ERASURES	32—34
CHAPTER VI.	
REVOCATION	35—47
CHAPTER VII.	
WILLS OF SOLDIERS AND SEAMEN	48—56
CHAPTER VIII.	
REVIVAL—REPUBLICATION—INCORPORATION—SECRET TRUSTS	57—66
CHAPTER IX.	
PROBATE AND ITS EFFECT	67—72
CHAPTER X.	
WHAT PROPERTY MAY BE DISPOSED OF BY WILL	73—79
CHAPTER XI.	
EXECUTORS, GUARDIANS, RELIGIOUS EDUCATION, &c. . . .	80—86

CHAPTER XII.

	PAGE
ELECTION	87—97

CHAPTER XIII.

WHO MAY BE DEVISEES OR LEGATEES	98—100
---	--------

CHAPTER XIV.

DESCRIPTION.—WHAT PASSES UNDER A SPECIFIC DESCRIPTION	101—111
---	---------

CHAPTER XV.

SPECIFIC, GENERAL AND DEMONSTRATIVE LEGACIES	112—121
--	---------

CHAPTER XVI.

CUMULATIVE AND SUBSTITUTIONAL LEGACIES	122—126
--	---------

CHAPTER XVII.

THE INCIDENTS ATTACHING TO SPECIFIC AND GENERAL LEGACIES	127—157
--	---------

CHAPTER XVIII.

AS TO THE MEANING OF CERTAIN WORDS	158—178
--	---------

CHAPTER XIX.

RESIDUARY GIFTS	179—203
---------------------------	---------

CHAPTER XX.

EXECUTION OF SPECIAL POWERS	204—208
---------------------------------------	---------

CHAPTER XXI.

CONVERSION	209—219
----------------------	---------

CHAPTER XXII.

GIFTS TO PERSONÆ DESIGNATÆ AND TO PERSONS FILLING A CERTAIN CHARACTER	220—237
---	---------

CHAPTER XXIII.

CONSTRUCTION OF GIFTS TO CHILDREN	238—254
---	---------

CHAPTER XXIV.

RULES FOR ASCERTAINING CLASS	255—264
--	---------

CHAPTER XXV.

MEANING OF WORDS DESCRIPTIVE OF RELATIONSHIP	265—275
--	---------

CONTENTS.

xvii

CHAPTER XXVI.

	PAGE.
GIFTS TO HEIRS, NEXT OF KIN, REPRESENTATIVES, AND EXECUTORS	276—294

CHAPTER XXVII.

GIFTS TO CHARITABLE USES	295—324
------------------------------------	---------

CHAPTER XXVIII.

SUCCESSIVE AND CONCURRENT INTERESTS, JOINT TENANCY AND TENANCY IN COMMON	325—335
--	---------

CHAPTER XXIX.

ESTATES IN FEE AND IN TAIL	336—356
--------------------------------------	---------

CHAPTER XXX.

ESTATES OF TRUSTEES	357—363
-------------------------------	---------

CHAPTER XXXI.

ON CERTAIN POWERS COMMONLY INSERTED IN WILLS	364—389
--	---------

CHAPTER XXXII.

ABSOLUTE INTERESTS IN PERSONALTY	390—408
--	---------

CHAPTER XXXIII.

GIFTS OF ANNUITIES	409—418
------------------------------	---------

CHAPTER XXXIV.

TENANT FOR LIFE AND REMAINDERMAN	419—449
--	---------

CHAPTER XXXV.

CONDITIONS PRECEDENT—VESTING	450—474
--	---------

CHAPTER XXXVI.

PERPETUITY AND ACCUMULATION	475—494
---------------------------------------	---------

CHAPTER XXXVII.

CONDITIONS SUBSEQUENT	495—517
---------------------------------	---------

CHAPTER XXXVIII.

LIMITATIONS BY WAY OF REMAINDER—DIVESTING	518—538
---	---------

CHAPTER XXXIX.

SUBSTITUTION	539—548
------------------------	---------

	AGE
CHAPTER XL.	
GIFTS TO SURVIVORS	549—561
CHAPTER XLI.	
THE CONSTRUCTION OF GIFTS OVER.	562—575
CHAPTER XLII.	
GIFTS OVER UPON DEATH WITHOUT ISSUE	576—587
CHAPTER XLIII.	
SHIFTING CLAUSES	588—591
CHAPTER XLIV.	
GIFTS BY REFERENCE.	592—596
CHAPTER XLV.	
EXECUTORY TRUSTS	597—602
CHAPTER XLVI.	
IMPLICATION	603—613
CHAPTER XLVII.	
REVOCATION.	614—619
CHAPTER XLVIII.	
ALTERING WORDS—UNCERTAINTY	620—623
CHAPTER XLIX.	
SATISFACTION AND ADEMPMENT	624—637
CHAPTER L.	
INTERESTS UNDISPOSED OF	638—655
CHAPTER LI.	
ADMINISTRATION.	656—679
CHAPTER LII.	
SUGGESTIONS FOR PREPARING WILLS	680—682
APPENDIX.	
THE WILLS ACT	683—689
INDEX.	690—787

TABLE OF CASES.

- | | |
|---|---|
| <p> AARON v. Aaron, 60, 63
 Abadam v. Abadam, 157
 Abbey, Hancox v., 136, 676, 679
 Abbiss v. Burney, 477, 588
 Abbot, Cary v., 300
 — v. Massie, 220
 Abbott, <i>Re</i>; Peacock v. Frigout, 481, 486
 — Bridge v., 290
 — Clarke v., 184
 — v. Fraser, 305, 306
 — Hopkins v., 162
 — Kennell v., 213
 — v. Middleton, 622
 — v. Parfitt, 382
 — v. Peters, 52
 — Playters v., 438
 Abd-ul-Messih v. Farra, 4, 6
 Abell, Chaffers v., 462
 — Marriott v., 526, 559
 Abercorn, Marq. of, Bedford, Duke of, v., 602
 Abey, Doe d. Borwell v., 421
 Abingdon, Prowse v., 459, 667
 — Stevenson v. (31 B. 305), 266, 267
 — Stevenson v. (11 W. R. 935), 498
 Abinger, Ld., Scarlett v., 503
 Abney v. Miller, 131
 Abraham, Bethell v. (22 W. R. 745), 626
 — Bethell v. (17 Eq. 24), 372
 — v. Joseph, 45
 Abram v. Aldridge, 387
 Abrams v. Winshup, 339
 Abrey v. Newman, 253
 Acason v. Greenwood, 515
 Acay v. Simpson, 660
 Acherley v. Vernon, 60, 451
 Acheson v. Fair, 395, 609
 Ackers, Phipps v., 146, 454, 455
 Ackland v. Lutley, 362
 Ackroyd v. Smithson, 214
 Ackworth v. Ackworth, 625
 Acland, Shelford v., 197, 199
 Acton v. Acton, 114
 — v. Crawley, 484 </p> | <p> Acton, Garnett v., 218
 — M'Neillie v., 382
 — v. White, 517
 Acworth, Coutts v., 88
 Adair, Maitland v., 639
 Adam, Wilkinson v., 54, 238, 241, 242, 244, 247
 Adams, <i>In bonis</i>, 33
 — <i>In re</i> (27 Ch. D. 394), 404, 476
 — <i>In re</i>; Adams v. Adams ([1893] 1 Ch. 329), 148
 Adams' Trusts (14 W. R. 18), 420, 519, 530
 Adams v. Adams ([1893] 1 Ch. 329), 148
 — v. Adams (25 B. 642), 234
 — v. Adams (6 Q. B. 860), 861
 — v. Adams ([1892] 1 Ch. 369), 498
 — v. Adams (14 Eq. 246), 545
 — v. Adams (1 Ha. 537), 613
 — v. Austen, 203
 — v. Beck, 237
 — v. Bush, 234
 — v. Ferrick, 135
 — Haddelsey v., 361, 549
 — Hereford, Bishop of, v., 301
 — v. Jones, 226
 — Jordan v., 279, 350, 353
 — Lavender v. (1 Add. 403), 33
 — v. Lavender (M'Cl. & Y. 41), 630
 — v. Lopdell, 405
 — Mudge v., 19
 — v. Roberts, 234
 — v. Taunton, 365
 — Wheeler v., 283
 Adamson, <i>In bonis</i>, 32, 81
 — v. Armitage, 514
 Addcott v. Addcott, 417
 Addenbrook, Murray v., 576, 584
 Adderley, Gillaume v., 114, 116
 Addis v. Clement, 182
 Addison v. Busk, 608
 — Ewens v., 502
 — Robinson v., 113, 114 </p> |
|---|---|

- Adkins, Smith *v.* 77
 Adnam *v.* Cole, 122, 298, 307
 Adney *v.* Greatrex, 266
 Adolph *v.* Dolman, 669
 Adolphus, Gordon *v.*, 450, 457
 Adshead *v.* Willetta, 343, 525
 Adv.-G., Brown *v.*, 10
 Affleck *v.* James, 176, 364
 Agar, Tenny *v.*, 337
 Agar-Ellis, *In re*, 85
 — *v.* Lascelles, 85
 Aglionby, Lauce *v.*, 678
 Agnew *v.* Pope, 616
 — Schenck *v.*, 530
 Ahearne *v.* Aherne, 610
 Aherne, Ahearne *v.*, 610
 Aikin *v.* Butler, 446
 Ailesbury, Marq. of, A.-G. *v.*, 127, 219
 Ainley, Wood *v.*, 338
 Ainslie, *In re*; Swinburn *v.* Ainslie, 440
 — *v.* Harcourt, 437, 438
 — Swinburn *v.*, 440
 Ainsworth, *In bonis*, 26
 Aird's Estate, *In re*; Aird *v.* Quick, 634
 Airey *v.* Bower, 199, 200
 — Ellison *v.*, 285
 Aislabie *v.* Rice, 496
 Aistrop, Roe d. Aistrop *v.*, 343
 Aitcheson *v.* Dixon, 8
 Aitken, Whitman *v.*, 568
 Aizlewood, Marshall *v.*, 505
 Aked, Milnes *v.*, 253
 Akerman, *In re*; Akerman *v.* Akerman, 132, 133
 Akeroyd's Settlement, *In re*; Roberts *v.* Akeroyd, 458
 Albemarle, Earl of, *v.* Rogers, 170
 Alberry, Scott *v.*, 176
 Alchin's Trusts, *Re*, 805
 Alcock *v.* Sloper, 446
 — *v.* Sparhawk, 672
 Aldam, Busk *v.*, 208
 Alder *v.* Lawless, 420
 Alderson, Maddison *v.*, 13
 Aldrich *v.* Cooper, 658
 Aldridge, *Re*; Abram *v.* Aldridge, 387
 — Doe d. Phillips *v.*, 303
 — *v.* Wallscourt, Ltd., 678
 Alexander, *In bonis*, 1
 — *v.* Alexander (5 B. 518), 126
 — *v.* Alexander (16 C. B. 59), 232, 453
 — *v.* Brame, 313, 314
 — *v.* Cross, 174
 — *v.* Douglas, 275
 — Dover *v.*, 239
 — Gillespie *v.*, 124
 — Hubbard *v.*, 124
 — Jeffries *v.*, 314
 — *v.* Jolley, 470
 — *v.* Mills, 368
 Alford, *Re*; Hunt *v.* Parry, 386
 — Attwood *v.*, 415, 542, 547
 Alger *v.* Parrott, 289, 390
 Allington, Booth *v.*, 117, 332
 Allam, *In bonis*, 81
 Allan, *In re*, 386
 — *v.* Backhouse, 437, 674
 — *v.* Gott, 677
 — Hollis *v.*, 441
 — *v.* Kelly, 113
 Allardice *v.* Onslow, 8
 Allcroft, Dent *v.*, 318, 319
 Allen, *In bonis*, 26
 — *In re*; Wilson *v.* Atter, 645
 Allen's Estate, 532
 Allen *v.* Allen (2 Dr. & War. 307), 74
 — *v.* Allen (30 B. 395), 140, 141, 142
 — *v.* Allen (12 A. & E. 451), 223
 — *v.* Anderson, 96
 — *v.* Bewsey, 74
 — Boyd *v.*, 371
 — *v.* Callow, 123, 124
 — Doe *v.*, 338
 — Doe d. Allen *v.*, 223
 — Farthing *v.*, 531
 — Festing *v.* (5 Ha. 576), 151, 152, 153
 — Festing *v.* (12 M. & W. 279), 455
 — Garfitt *v.*, 670
 — Gethin *v.*, 167
 — Hawkins *v.* 317
 — Hearn *v.*, 172
 — *v.* Jackson, 451, 499
 — James *v.*, 298, 306
 — *v.* Maddock, 62
 — *v.* Manning, 53
 — M'Cutcheon *v.*, 607
 — *v.* M'Pherson, 72
 — Nash *v.*, 600
 — *v.* Norris, 372
 — Phillips *v.*, 338
 — *v.* Poulton, 181
 — *v.* Webster, 244
 Allenby, Lewis *v.*, 318
 Allgood *v.* Blake, 267, 278, 279, 325
 — *v.* Withers, 342
 Allhusen *v.* Whittall, 446, 448
 Allin *v.* Crawshaw, 606
 Alloway *v.* Alloway, 332
 Allsop, Holland *v.*, 561
 — and Joy's Contract, *Re*, 358
 All Souls' Coll. *v.* Codrington, 110
 Allum *v.* Fryer, 372
 Allwood *v.* Heywood, 439
 Almack *v.* Horn, 248
 Alpess *v.* Watkins, 342
 Alsbury, *In re*; Sugden *v.* Alsbury, 441
 Alsop *v.* Bell, 665
 — Webster *v.*, 658
 Alston, Lee *v.*, 426, 427

- Alt v. Gregory, 254
 — v. Stratheden and Campbell,
 Lord, 306
 Alty v. Moss, 557
 Ambler, Pettinger v., 200
 Ames, *In re*; Ames v. Ames, 504
 — *In re*; Ames v. Taylor, 389
 — v. Ames, 505
 — v. Cadogan, 205
 — v. Parkinson, 388
 — Prichard v., 512
 — v. Taylor, 389
 Amherst's Trusts, *In re*, 507
 — Bate v., 232
 — Earl of, Leeds, Duke of, v.,
 428
 Amies' Estate, *In re*; Milner v. Mil-
 ner, 513
 Amias, *In bonis*, 24, 26, 30
 Amos, *In re*; Carrier v. Price, 98,
 297, 420
 Amphlett v. Parke, 211
 Amson v. Harris, 251
 Amyott, Jacobs v., 392
 Ancaster, Duke of, v. Meyer, 136
 Ancona v. Waddell, 510
 Anderson, *In bonis*, 58
 — Allen v., 96
 — v. Anderson (13 Eq. 381),
 100
 — v. Anderson (30 B. 209),
 350
 — v. Anderson (33 B. 223), 416,
 417, 662
 — Atkinson v., 239
 — v. Dwyer, 155
 — Ewing v., 502
 — Gordon v., 123
 — Hughes v., 331
 — v. Laneville, 8
 — v. London City Mission, 128
 — Price v., 441
 — Radstone v., 131
 — Wallace v., 407
 Andover, Lord, Heneage v., 674
 Andree v. Ward, 581
 Andrew, *Re*, 469
 — v. Andrew (1 Ch. D. 410),
 345, 454, 603, 647
 — v. Andrew (1 Coll. 690), 518,
 519
 — A.-G. v., 321
 — Drennan v., 526
 — Fulton v., 21, 22
 — v. Motley, 44
 — v. Trinity Hall, 88
 — v. Williames, 430
 Andrewes v. George, 636
 Andrew, *Ex parte*; *In re* Fells, 384
 — *In re*, 83
 Andrews' Trusts, *Re*, 474
 — Will, *Re*, 393
 Andrews v. Andrews (15 L. R. Ir.
 199), 247
 — v. Andrews (1 Coll. 186), 401
 Andrewa, Douglas v., 537
 — v. Le Gay, 349
 — v. Lord, 533, 535
 — v. Partington, 255
 — v. Salt, 85
 — Woollen v., 488
 Andros, *In re*; Andros v. Andros,
 239
 Androvin v. Poilblanc, 653
 Angel, Davis v., 501
 Angell, Brewster v., 602
 — Doe d. Angell v., 277
 Angermann v. Ford, 150, 292
 Angrave, Wing v., 526
 Ann, *In re*; Wilson v. Ann, 664
 Annesley, Tooker v., 429
 Annis, Burke v., 339
 Anon. (3 Leon. 71, pl. 108), 76
 — (3 Dyer, 323 b.), 170
 — (Prec. Ch. 8), 191
 — (3 Dyer, 371 b.), 372
 — (2 Eq. Ab. 757), 425
 — (Cro. Eliz. 61, 464), 431
 — (1 And. 33), 622
 — (1 Vern. 104), 674
 Ansley v. Cotton, 156
 Anslow, *In re*; *Ex parte* Barber,
 384
 Anstee, *In bonis*, 26
 — Eames v., 594
 — v. Nelms, 101
 Anstey, Stroughill v., 364, 373, 375
 Anstice, *Re*, 533, 535
 Anstis, *In re*; Chetwynd v. Morgan,
 16
 Anstruther v. Chalmer, 3
 — Ouseley v., 676, 678
 Answorth, Palmer v., 195
 Anthony, *In re*; Anthony v. An-
 thony, 139
 Antrobus, Johnson v., 530
 — v. Nepean, 54
 Apjohn, Clune v., 637
 Aplin's Trust, 97
 Appach, Walker v., 448
 Applebee, *In bonis*, 37
 Appleford, Easum v., 191, 202
 Appleton, *In re*; Barber v. Tebbit,
 292, 293
 — v. Rowley, 390, 511
 Applin, Doe d. Blandford v., 354
 Ap Rice's Case, 424
 Apsey v. Apsey, 532
 Apthorp, Walpole v., 120
 Arbib & Class' Contract, *In re*, 503
 Arbouin, Pritchard v., 317
 Archbold v. Austin Gourlay, 456
 Archdall, *In re*, 81
 Archer, *In bonis*, 26
 Archer's Case, 353
 Archer v. Jegon, 472
 — v. Lavender, 512
 — v. Legg, 252
 — v. Prall, 386
 — v. Borke, 512

- Archibald v. Wright, 77, 395
 Ardagh, Makeown v., 129, 304, 305
 Arden v. Goodacre, 507
 Ariel, Tidswell v., 641
 Arkell v. Fletcher, 170
 Arkins, Dillon v., 164
 Arkle, Williams v., 294, 652
 Armitage, *In re*; Armitage v. Garnett, 441, 442
 — Adamson v., 514
 — Calvert v., 668
 — v. Coates, 477
 — v. Garnett, 442
 — v. Williams, 251, 257, 258
 Armstead, Eidsforth v., 373
 Armstrong, *In re*, 162
 — *In re*; Mayne v. Woodward, 122, 125
 — v. Armstrong (12 Eq. 614), 183
 — v. Armstrong (7 Eq. 518), 328, 331, 333, 404
 — v. Armstrong (18 Eq. 541), 375
 — v. Armstrong (21 L. R. Ir. 115), 575
 — v. Buckland, 107
 — v. Burnet, 135
 — v. Clavering, 227
 — v. Eldridge, 422
 — v. Lynn, 637
 — Monsell v., 367
 — Quinn v., 208
 — v. Reeves, 298
 — Tullett v., 516
 — Walker v., 45
 Arnitt, Naylor v., 379
 Arnold, *Ex parte*; *Re Battersea Park Acts*, 216
 — *In re*; Ravenscroft v. Workman, 668
 Arnold's Estate, *Re*, 339, 562, 578, 613
 — Trusts, *In re*, 551
 Arnold v. Arnold, 165, 188, 661
 — v. A.-G., 308
 — Burt v., 148
 — v. Chapman, 646, 658
 — Claridge v., 340
 — v. Dixon, 219
 — v. Enis, 447
 — Johnson v., 209
 — v. Kayes, 135, 414, 515
 — Limpus v., 636
 Arrow v. Mellish, 253
 Arrowsmith's Trust (27 L. J., Ch. 704; 4 Jur. N. S. 1128), 163
 — Trusts, *Re* (6 W. R. 642), 185
 — Trusts, *In re* (2 D. F. & J. 474), 567, 613
 Arthur, *In bonis*, 26, 28
 — v. Hughes, 530
 — v. Mackinnon, 110
 Arundel's Case, Earl of, 498
 Arundel, Watson v., 190
 Arundell, Watson v., 212
 Asgill, Legge v., 159, 192
 Ash v. Ash, 282
 Ashbie, Leventhorpe v., 391
 Ashburner v. Macguire, 114, 116, 127, 129
 — v. Wilson, 231
 Ashburnham's Trust, *In re*, 387
 Ashburton, Lord, Bainbridge v., 185
 — Baring v., 96
 Ashby, *In re*; *Ex parte* Wresford, 407
 — v. Baines, 338, 672
 Ashdown, Lord, Cosby v., 92
 Ashenhurst's Case, 277, 279
 Asher, Harrison v., 127
 — v. Whitlock, 75
 Ashford, Davies v., 118
 — Sanders v., 580, 644
 Ashley v. Ashley, 480, 578, 612
 — Doe d. Remow v., 109
 Ashling v. Knowles, 542
 Ashmall, Stretton v., 378
 Ashmore, *In bonis*, 28, 30
 Ashmore's Trusts, *In re*, 465, 466
 Ashton, *In bonis*, 28, 223
 — v. Ashton, 113
 — Birchall v., 360
 — Ion v., 679
 — v. Lord Langdale, 315
 — Trafford v., 232, 674
 — Williams v., 32, 33, 233
 — v. Wood, 78
 Ashworth, Fielden v., 271, 283
 — v. Munn, 312, 313, 668, 679
 — Shiers v., 645
 — Simpson v., 336
 Askew v. Askew, 550, 558, 610
 — Dingwell v., 17, 128
 — v. Booth, 161
 — v. Thompson, 151
 — v. Woodhead, 449
 Askey, Birds v., 667
 Askham, Berry v., 674
 Askin v. Ferguson, 146, 595
 Aspinall v. Duckworth, 292, 641, 643, 645
 — v. Petvin, 604, 605
 Asquith v. Saville, 544
 Asten v. Asten, 109, 623
 Astley, Bulwer v., 433
 — Edward v., 33
 — v. Essex, Earl of (6 Ch. 898), 155
 — v. Essex, Earl of (18 Eq. 290), 496, 506
 — Evans d. Brooke v., 578
 — v. Micklethwait, 261, 521, 663
 Aston, *In bonis*, 159, 187
 — v. Aston, 425
 — Brandon v., 147, 148, 256
 — v. Gregory, 151

- Aston v. Wood, 88, 129, 192, 303,
 398, 402
 Astor, *In bonis*, 70
 Asylum, President of the, Mellick v.,
 298
 Atcheson v. Atcheson, 230, 334
 Atherden, Morris v., 167
 Atherton v. Crowther, 290, 291
 — Countess of Harrington v.,
 443, 448
 — Potts v., 464
 Athill, *In re*, 142
 Atkins v. Hiccocks, 463
 Atkinson, *In bonis*, 86
 — *In re*; Wilson v. Atkinson,
 330
 — v. Anderson, 239
 — v. Atkinson, 398, 544
 — Atter v., 22
 — v. Barton, 604, 611
 — v. Bartrum, 539
 — Bernasconi v., 225, 226
 — v. Fawcett, 338
 — v. Featherstone, 350
 — Fullock v., 52
 — Gordon v., 330
 — Grayson v., 24, 178
 — Henshaw v., 320
 — v. Jones, 538
 — v. L'Estrange, 391
 — v. Littlewood, 630, 631
 — v. Paice, 607
 — Pickup v., 445
 — Reid v., 400
 — v. Webb, 630
 — Wilson v., 285, 330
 Atkyns, Wright v., 273, 400
 Atlee v. Hook, 19
 Atree v. Atree, 177
 Atter v. Atkinson, 22
 — Wilson v., 645
 A.-G. v. Ailesbury, Marquis of,
 127, 219
 — v. Andrew, 321
 — Arnold v., 308
 — v. Bacchus, 231
 — v. Baxter, 303
 — v. Bayley, 391
 — Baylis v., 221
 — Bevan v., 116, 167
 — Beverley, Mayor of, v., 309
 — v. Blizard, 302
 — v. Boulton, 304
 — v. Bovill, 302
 — v. Bowyer, 305
 — v. Brackenbury, 199
 — v. Brandreth, 301
 — v. Brasenose Coll., 309
 — v. Bristol, Mayor of, 308
 — v. Buckland, 302
 — v. Catherine Hall, 505
 — v. Chester, Bishop of, 305
 — v. Coombe, 301
 — v. Cordwainers, 309
 — v. Daly, 144
 A.-G. v. Davies, 317, 320
 — v. Delaney, 301
 — v. Doyley, 273, 307
 — v. Drapers, 308
 — v. Dunn, 6
 — v. Exeter, Corporation of, 301
 — Fisk v., 304, 308
 — v. Fitzgerald, 8
 — v. Fletcher, 332, 367
 — v. Gladstone, 303
 — Glubb v., 319
 — v. Goddard, 317
 — v. Greenhill, 505
 — v. Grote, 115
 — v. Hall, 302, 318
 — v. Harley, 124, 312, 313
 — v. Hinxman, 307, 320
 — v. Hodgson, 317, 318
 — v. Hotham, Lord, 296
 — v. Hurst, 657
 — v. Hyde, 319
 — Jauncey v., 150, 156
 — v. Jesus Coll., 308
 — v. Johnstone, 193
 — v. Jones, 10
 — v. Kent, 7, 8
 — v. Lawes, 299
 — v. Lloyd, 617
 — Lloyd-Graeme v., 299
 — v. Lomas, 215
 — v. Malkin, 390
 — v. Mangles, 209
 — v. Marchant, 308
 — v. Marlborough, Duke of, 424
 — Marsh v., 305, 313
 — Mercers' Co. v., 309
 — v. Merchant Taylors, 308, 401,
 450
 — v. Mill, 320
 — v. Milner, 645
 — v. Munby, 321
 — v. Napier, 7
 — v. Northumberland, Duke of,
 302
 — v. Oxford, Bishop of, 305
 — v. Parnter, 14
 — v. Parsons, 317
 — v. Pearson, 299
 — Pocock v., 303
 — v. Poulden, 417, 490, 494
 — Powell v., 301
 — v. Price, 301, 302
 — Reeve v., 304
 — v. Robins, 661
 — Rook v., 251
 — v. Rowe, 7
 — Salter v., 466
 — v. Sands, 650
 — Society for P. G. v., 309
 — Southmolton v., 309
 — Stone v., 160, 306
 — v. Sturge, 310
 — v. Sutton, 580
 — v. Tancred, 321
 — Thruxton v., 649

- A.-G. v. Tomkins, 852
 — v. Trinity Coll., 309
 — Turner v., 75
 — v. Vigor, 180, 279
 — v. Wahlstatt, Countess de, 4
 — Wallace v., 174
 — v. Ward, 54, 617
 — v. Wax Chandlers, 308, 401, 450
 — r. Webster, 296
 — v. Whitchurch, 318
 — v. Whorwood, 321
 — v. Wilkinson, 197
 — v. Williams, 318, 320
 — v. Wiltshire, 190
 — v. Winchelsea, Lord, 657
 — v. Windsor, Dean of, 309
 — of British Honduras v. Brit-
 tows, 177
 — of New South Wales, Platt v.,
 8
 Attree v. Haws, 315, 316
 Attwater v. Attwater, 103, 453, 504,
 605
 Attwood v. Alford, 415, 542, 547
 — Toller v., 353, 362
 Atwell v. Atwell, 211
 Atwood, Latham v., 431
 Aubin v. Daly, 410
 Audley, Jee v., 477, 480, 584
 Audsley v. Horn, 327, 347
 Auldjo v. Wallace, 595
 Austen, *In bonis*, 52
 Austen, Adams v., 203
 — v. Collins, 503
 — Comport v., 460
 — v. Taylor, 597
 Auster v. Powell, 635
 Austin v. Austin, 513
 — Eavestaff v., 647
 — Gourlay, Archbold v., 456
 — v. Tawney, 174
 Avalyn v. Ward, 527
 Avern v. Lloyd, 390, 480
 Avis v. Newman, 430
 — Roe d. James v., 180
 Avison, Eastwood v., 580
 — v. Holmes, 509
 — v. Simpson, 187, 281
 Awdry, Cloves v., 204
 — Milsom v., 536, 594
 Ayles' Trusts, *In re*, 242
 Aylesbury's Case, Lady, 165
 Aylesbury, Lady, Popham v., 165
 Aylmer, Morrice v., 164
 Aylwin's Trusts, 256, 509
 Aynsley v. Reed, 435
 Ayres, *In bonis*, 80
 Ayrey v. Hill, 15
 Ayscough v. Savage, 252
 Baber, Johnstone v. (6 D. M. & G.
 439), 170
 — Johnstone v. (8 B. 233), 365
 Babington, Stuart v. 486
 Bacchus, A.-G. v., 231
 Back v. Kett, 95
 Backhouse, Allan v., 437, 674
 Bacon's Will, *In re*; Camp v. Coe,
 653
 Bacon v. Cosby, 88, 574
 — Macleoth v., 274
 — Taylor v., 404
 Baddeley, Porter v., 444
 Badger v. Gregory, 551
 Badham v. Mee, 414
 — Seifferth v., 287
 Badley, Brook v., 312, 313, 314, 317
 — Jones v., 66
 Badrick v. Stephens, 114
 Baggett v. Meux, 514, 515, 516
 Bagley, Loch v., 600
 — v. Mollard, 238, 243, 244
 Bagnall v. Downing, 11
 Bagot, *Re*; Paton v. Ormerod, 192,
 193, 613
 Bagot's Settlement, *In re*; Bagot v.
 Kittoe, 439
 Bagot v. Bagot, 426, 429
 — Brouncker v., 391
 — v. Kittoe, 439
 — v. Legge, 583, 589, 666
 Bagshaw's Trusts, *In re*, 420, 618
 Bagshaw, Gill v., 221
 — v. Spencer, 360, 523
 Baile v. Coleman, 348
 Bailey, *In bonis*, 20, 25
 — *In re*, 672, 673
 — v. Bailey, 672, 673
 — v. Lloyd, 205
 — Millard v., 102, 109, 113
 — Moore v., 547
 — v. Pugh, 277
 Baillie, Leighton v., 187
 — v. Treharne, 331
 Bailly, *In bonis*, 81
 — Jennings v., 394
 Bain v. Leasher, 326, 644
 Bainbridge v. Lord Ashburton, 185
 — v. Bainbridge, 161
 — v. Cream, 256
 — Marples v., 500
 — Parkin v., 33
 Baine, Willing v., 523
 Baines, Crigan v., 529
 — v. Dixon, 674
 — Doe d. Ashby v., 338, 672
 — v. Dowling, 430
 — v. Ottey, 290
 Baker v. Baker, 251, 417
 — v. Batt, 22
 — v. Bayldon, 269
 — v. Bradley, 516
 — v. Dening, 24
 — Domville v., 130
 — Eastman v., 572

B., W. v., 500

Babb, Lamkin v., 53

- Baker v. Farmer**, 120, 662
 — *v. Gibson*, 287
 — *v. Hall*, 646
 — *v. Hanbury*, 641, 643
 — *Harwood v.*, 14
 — *Hearn v.*, 549, 554
 — *Higham v.*, 109
 — *James v.*, 530
 — *v. Ker*, 514
 — *Lichfield v.*, 446
 — *v. Martin*, 415
 — *Mason v.*, 249
 — *v. Mosley*, 400
 — *v. Parson*, 360
 — *Parsons v.*, 400
 — *Potter v.*, 413
 — *Reeves v.*, 188, 395
 — *Rust v.*, 543
 — *v. Sebright*, 425
 — *Shanley v.*, 595
 — *v. Story*, 40, 616
 — *v. Sutton*, 317
 — *Toplis v.*, 639
 — *v. Tucker*, 579
 — *v. Wall*, 279, 342
 — *v. White* (20 Eq. 166), 358, 359, 360
 — *White v.* (2 D. F. & J. 55), 559
Baldock v. Green, 119, 491, 674
Baldwin v. Baldwin (22 B. 419), 306, 323
 — *v. Baldwin* (6 Ir. Ch. 156), 433
 — *Garth v.*, 391
 — *Langley v.*, 580
 — *Miner v.*, 412, 416
 — *v. Rawding*, 569, 571
 — *v. Rogers*, 482
Balfour v. Cooper, 154
 — *Woodhouse v.*, 27, 69
Ball, In re; Slattery v. Ball, 575
Ball's Trusts, In re, 285
Ball, Evans v., 211
 — *Forbes v.*, 206
 — *v. Harris*, 373, 671
 — *Johnson v.*, 64
 — *Slattery v.*, 575
Ballance, In re, 195
Ballard v. Marsden, 134, 388
Balm v. Balm, 257
Bamford, Brown v., 617
 — *v. Chadwick*, 582
Bampffield, Popham v., 451
Banchereau, Peters v., 83
Bankhead, McClenaghan v., 586
Bankes, Floyer v., 479
 — *v. Holme*, 478, 587
 — *v. Baroness Le Despencer*, 599, 601
Banks' Trusts, In re, 603
 — *Trust, In re; Ex parte Hovill*, 391
Banks v. Braithwaite, 156, 414
 — *Dobson v.*, 194
 — *v. Goodfellow*, 14
 — *v. Heaven*, 147, 148
Banks, Kaye v., 425
 — *v. Scott*, 219
Bannerman's Estate, In re; Bannerman v. Young, 157
Bannerman v. Toosey, 538
 — *v. Young*, 157
Bannister, Haley v. (23 B. 336), 126
 — *Haley v.* (4 Mad. 275), 491
 — *Doe d. Jearrod v.*, 336
 — *Wilks v.*, 267, 567
Banon, Riordan v., 64
Bantry, Longfield v., 128, 233, 656
Barber, In bonis, 47
 — *In re; Burgess v. Vinnicome*, 100
Barber's Settled Estates, In re, 439, 520
Barber, Ex parte, 162
 — *Ex parte; In re Anslow*, 384
 — *v. Barber*, 153, 645
 — *Cockarell v.*, 293
 — *Collison v.*, 567
 — *Gardiner v.*, 415
 — *Simon v.*, 305
 — *Sulley v.*, 456
 — *v. Tebbit*, 292, 293
 — *White v.*, 248
 — *Wilkinson v.*, 312, 320
 — *v. Wood*, 109, 657, 658
Barclay v. Maskelyne, 617
 — *v. Wainwright* (8 Ves. 462), 123, 124
 — *v. Wainwright* (14 Ves. 66), 441
Bardon, In bonis, 68
 — *v. Meagher*, 413, 414
Bardon v. Bardon, 559
Bardswell v. Bardswell, 399
Barford, Doe v., 55
Bargeman, Scott v., 612
Baring, In re; Jeune v. Baring, 382, 434
 — *v. Ashburton*, 96
 — *Jeune v.*, 382, 434
Barkenshaw v. Hodge, 122
Barker, In re; Asquith v. Saville, 544
Barker's Estate, In re; Hetherington v. Longridge, 195
 — *Trust* (1 Sm. & G. 118), 263
 — *Trusts, In re* (52 L. J. Ch. 565), 391
Barker v. Barker (16 Ch. D. 44), 466
 — *v. Barker* (10 Eq. 438), 503
 — *Christie v.*, 432
 — *v. Cocks*, 535
 — *v. Duke of Devonshire*, 672
 — *Eaton v.*, 525
 — *Farrer v.*, 469
 — *v. Giles*, 329
 — *v. Greenwood*, 358
 — *v. Lea*, 466, 468, 537
 — *v. Perowne*, 145, 447
 — *Phillips v.*, 222
 — *Prescott v.*, 183

- Barker, Rudge v., 559
 — Wharton v., 287, 288
 — v. Young, 572
 Barkdale v. Gilliatt, 156
 Barkshire, Dixon v., 471
 Barley, Cruse v., 212
 Barlow, Bowen v., 171
 — Bradley v., 470
 — Dixon v., 322
 — v. Grant, 405
 — Incorporated Society v., 318, 320
 — Phillips v., 429
 — v. Salter, 586
 Barnaby v. Tassell, 187, 249, 251, 253, 256, 544
 Barnacle v. Nightingale, 578
 Barnard, Day v., 285
 — Sitwell v., 448
 — Stavers v., 247
 — Lord, Vane v., 425
 Barnardiston v. Carter, 523
 Barnardo v. McHugh, 84
 Barneby, Higginson v., 601, 602
 — Smith v., 289
 BARNED v. Sax, 503
 Barnes v. Crowe, 60, 62
 — Edwards v., 175
 — v. Grant, 400, 402
 — Howell v., 365, 367
 — v. Jennings, 523, 542
 — v. Patch, 251, 274, 275
 — v. Rowley, 410
 — Skey v., 612
 — Wilson v., 296
 Barnett v. Barnett, 460, 605
 Barnett v. Blake, 99
 — Goodlad v., 111
 — Patching v., 118, 144, 192, 193, 222, 409, 455, 482, 484, 665, 677
 — v. Tugwell, 242
 — Wilday v., 199
 — Van v., 210
 Barney, *In re*; Harrison v. Barney, 434
 Barnshaw's Trust, *In re*, 466
 Barnwell v. Iremonger, 667
 Baron, Pearse v., 602
 — Wood v., 345
 Barraclough v. Greenhough, 71
 — v. Shillito, 268
 Barré, Stocks v., 159
 Barrett v. Beckford, 630
 — Box v., 89
 — Gill v., 473
 — Rickard v., 658, 667
 — Saltmarsh v., 294, 652
 — v. White, 159
 Barrington's Settlement, *In re*, 432
 Barrington, Galley v., 578
 — Lord, Hood v., 70
 — v. Liddell, 491, 492
 — v. Tristram, 247
 Barrow v. Barrow, 90
 — Broadbent v., 304, 677, 678
 — Crompe v., 486, 523
 — Green v., 531
 — Hawksley v., 16
 — Herring v., 77, 396, 520
 — Obert v., 298, 307
 — v. Wadkin, 99
 Barrs v. Fewkes, 294, 398
 Barry, Brodie v., 96
 — v. Rutlin, 21
 — Clery v., 69
 — Drew v., 410
 — v. Harding, 134, 162
 — Richardson v., 42
 — Sambourne v., 596
 Barrymore v. Ellis, 517
 Barstow v. Pattison, 506
 Barter, Seale v., 346
 Bartholomew, *In re*, 462
 Bartholomew v. Henley, 11
 Barthrop, Doe v., 360, 361
 Bartle, Doe d. Nethercote v., 180
 Bartlett v. Gillard, 630
 — Rose v., 182, 183
 Barton's Will, *In re*, 381, 441, 442
 Barton, Atkinson v., 604, 611
 — v. Barton, 505
 — Beakton v., 258, 533
 — v. Briscoe, 516
 — Buckland v., 196
 — v. Cooke, 405
 — Denny v., 11
 — Gath v., 452
 — Horne v., 602
 Bartrum, Atkinson v., 539
 Barwick v. Mullings, 12, 54
 — Wells v., 660, 661
 Barwise, Buck v., 333
 Basan v. Brandon, 128
 Bashford v. Chaplin, 595, 622
 Baskerfield, Burrell v., 209, 473
 Baskett v. Lodge, 595
 Basset, Hitchins v., 41
 Basset's Estate, *In re*; Perkins v. Fladgate, 187, 250
 Bassett, Cox v., 55
 — Toovey v., 340, 583
 Bassil v. Lester, 490
 Bastard, Polden v., 173
 — v. Proby, 598
 Batchelor, *In re*; Sloper v. Oliver, 133
 — Bennett v., 189, 652
 Bate, *Re*; Bate v. Bate, 658
 — v. Amherst, 232
 — v. Bate, 658
 — v. Hooper, 377
 — Southouse v., 394, 395
 Bateman v. Davis, 379
 — v. Gray, 258, 264
 — v. Hotchkin (31 B. 486), 426
 — v. Hotchkin (10 B. 426), 479
 — v. Pennington, 33

- Bates, *In re*, 554
 — Greenhalgh v., 562
 — Leech v., 28
 — Mackinley v., 440
 — Moffett v., 88
 — Olney v., 472, 642
 Bateson, Newman v., 151
 Bath and Wells, Bishop of, Proctor v., 481, 482
 Bathurst v. Errington, 238
 Batley, Ford v., 411
 Batsford v. Kebbell, 465
 Batt, Baker v., 22
 Batteley v. Windle, 652
 Batten v. Earnley, 155
 Battersby's Estate, *In re*, 626
 Battersea Park Acts, *Re*; *Ex parte* Arnold, 216
 Batteste v. Maunsell, 219
 Battison, Minors v., 211, 567, 568
 Battyl v. Lyles, 46
 Bawden, *In re*; National Provincial Bank of England v. Cresswell, 663, 673
 Baxter's Trusts, *Re*, 460, 467
 — A.-G. v., 303
 — v. Brown, 315
 — v. Losh, 612
 — v. Morgan, 222
 Bayldon, Baker v., 269
 Bayle v. Mayne, 54
 Baylee v. Quin, 122
 Bayley's Settlement, 235, 236
 Bayley, A.-G. v., 391
 — v. Bishop, 410
 — Sanderson v., 266
 — v. Snelham, 241, 242
 Baylis, *In bonis* (1 P. & D. 21), 81
 — *In bonis* (1 Sw. & T. 613), 208
 — v. A.-G., 221
 — Partridge v., 565
 Bayly, Wilson v., 556, 571
 Baynton, Perkins v., 332
 Bazett, Norton v., 29
 Beach, Hurst v., 122, 125
 — v. Lord Jersey, 102, 108
 Beachcroft v. Beachcroft, 224, 241
 Beal, Phillips v., 518
 Beale v. Connolly, 564
 — v. Symonds, 650
 Beales v. Crisford, 161, 274, 325
 — v. Spencer, 512
 Beamish v. Beamish, 23, 615
 Bean v. Griffiths, 497
 — v. Halley, 608
 — Lepine v., 242, 570
 Beard, *In re*; Simpson v. Beard, 167
 — Boulton v., 471
 — Simpson v., 167
 — v. Westcott, 481, 488
 Beare, Desinge v., 166
 Beattie, Johnston v., 5, 7
 Beaty v. Beaty, 52
 Beauchant v. Ustick, 232, 345
 Beauclerk, Lord, v. Dormer, 586
 — Duke of St. Albans v., 123, 124
 — v. James, 89
 — Lord, Kenrick v. (3 B. & P. 178), 358, 362
 — Lord, Doe d. Kenrick v., (11 East, 667), 496
 — Lord, v. Mead, 616
 Beaufort, Granville v., 654
 Beauman v. Stock, 612
 Beaumont, *In re*, 5
 Beaumont's Trusts, 317
 Beaumont, Clifford v., 501
 — Darbison d. Long v., 277
 — v. Fell, 221
 — v. Oliveira, 295, 668
 — v. Marquis of Salisbury, 361
 — v. Squire, 501
 — Stackpole v., 499, 500
 Beavan, *In bonis*, 34
 — *Re*; Beavan v. Beavan, 158, 162
 — v. Beavan (53 L. T. 245), 158, 162
 — v. Beavan (24 Ch. D. 649 n.), 448
 Beaver, Lynn v., 654
 — v. Nowell, 344, 393, 612
 Bebb v. Beckwith, 543
 Beck's Trusts, *Re*, 551
 Beck, Adams v., 237
 — Hale v., 607
 Beckett, Daly v., 429
 — v. Harden, 54, 616
 — v. Howe, 28
 Beckford, Barrett v., 630
 — Peppin v., 230
 Beckitt, Newbald v., 450
 Beckton v. Barton, 253, 533
 Beckwith, Bebb v., 543
 — v. Beckwith, 551, 552
 Bective, Countess of, v. Hodgson, 490
 — Earl of, v. Hodgson, 147, 214
 — Earl of, Hodgson v., 146
 — Earl of, Kenlis, Lord, v., 590
 Bedale, Boyes v., 239
 Beddard, Wilson v., 24
 Bedford, Duke of, v. Marquis of Abercorn, 602
 — v. Bedford, 677
 — Carr v., 302
 — Dommatt v., 422
 — Harris v., 53
 — Kirkpatrick v., 122, 150, 155
 — Roe d. Thong v., 348
 — v. Teal, 315, 316
 Bedingfield and Herring's Contract, *In re*, 368
 Bedson's Trusts, *In re*, 256
 Bedwell, Townley v., 216, 217, 218
 Beech, Chaworth v., 116
 — v. Lord St. Vincent, 493
 Beechey, Goblet v., 101
 Beeston v. Booth, 661
 Beetham, Shephard v., 312, 666, 668

- Beavor, Mainwaring v., 147, 257, 258
 Begley v. Cook, 422
 Belaney v. Belaney, 175
 — v. Kelly, 86
 Belaysse v. Earl of Lucan, 170
 Belbin v. Skeats, 69
 Belfast Town Council, *In re*; Sayers,
 Ex parte, 554
 Bell, *In bonis*, 81
 — Alsop v., 665
 — v. Bell (15 Ir. Ch. 517), 345
 — v. Bell (I. R. 6 Eq. 239), 417,
 660
 — Blann v. (2 D. M. & G. 775),
 395, 444
 — Blann v. (7 Ch. D. 382), 657,
 662
 — v. Cade, 464
 — Consett v., 10
 — Dowson v., 95
 — v. Fothergill, 45
 — Hanna v., 248
 — Ibbott v., 32
 — v. Kennedy, 5, 6, 8
 — Logan v., 75
 — Newbegin v., 656
 — v. Phyn, 570, 571
 — Roe d. Ryall v., 103
 — Silcox v., 267
 — Wilson v., 331
 Bellairs v. Bellairs, 498, 499
 Bellamy, *In bonis*, 33
 — *In re*, 376
 — *Re*; Pickard v. Holroyd, 499
 — Brophy v., 386
 — Longworth v., 229
 Bellasis' Trust, *In re*; 328
 Bellasia v. Uthwait, 626
 Bellingham, Earle v., 150, 417, 418
 Bellis' Trusts, *In re*, 186
 Bempde v. Johnstone, 6
 Benbow, Early v., 122, 155
 — Storrs v., 258, 263, 483
 Bence, *In re*; Smith v. Bence, 482,
 522
 — v. Smith, 484
 Bench v. Biles, 678
 Bending v. Bending, 94, 95
 Benet Coll. v. Bishop of London, 98,
 821
 Bengal, Adv. Gen. of, Lyons, Mayor
 of, v., 304
 Bengough v. Walker, 626
 Benn, *In re*; Benn v. Benn, 552
 Bennet v. Bennet, 232
 Bennett, *In re*; *Ex parte* Kirk, 110,
 163
 Bennett's Case, 618
 — Trusts, 463, 546
 Bennett v. Batchelor, 189, 652
 — v. Bennett (2 Dr. & Sm. 266),
 340
 — v. Bennett ([1893] 2 Ch. 413),
 389
 — Bullock v., 500, 501
 Bennett, Cox v., 131, 517
 — v. Davis (2 P. W. 316), 512
 — Davis v. (4 D. F. & J. 327),
 252
 — Dawes v., 618
 — Doe d. Guest v., 163
 — v. Honeywood, 271, 310
 — v. Houldsworth, 90, 625, 627
 — King v., 232
 — Lawes v., 216, 217
 — v. Lowe, 580
 — v. Marshall, 224
 — May v., 416
 — v. Rebbeck, 374
 — v. Tankerville, Earl of, 348,
 850
 — Thomas v., 629
 — Wilson v., 78
 Benson v. Benson, 44
 — v. Maude, 150
 — Pain v., 559
 — v. Whittam, 404
 Bent, Cafe v., 372, 445
 — v. Cullen, 413
 — Roffey v., 508
 Bental, Carter v., 269
 Bentham v. Wilson, 266
 — v. Wiltshire, 372
 Bentinck, Lowther v., 387
 Bentinck v. Duke of Portland, 484
 Bentley, *In re*, 439
 — v. Blizzard, 242
 — v. Meech, 573
 — v. Oldfield, 333
 — v. Robinson, 672
 — Sherratt v., 420, 618
 Benton, *In re*; Smith v. Smith, 515
 Benyon, *In re*; Benyon v. Grieves,
 125, 223
 — v. Benyon, 124, 125
 — Ferguson v., 219
 — v. Grieves, 125, 228
 Berchtoldt, Chatfield v., 421
 Berens v. Fellowes, 277
 Bergavenny, Lady, Richards v., 353
 Berkeley, Clarke v., 501
 — Hussey v., 267
 — v. Pulling, 250
 — v. Swinburne (16 Sim. 275),
 255, 460
 — v. Swinburne (6 Sim. 613), 404
 Berks v. Berks, 41
 Bermingham, *In re*, 669
 — v. Burke, 669
 — v. Tuite, 233, 237
 Bernal v. Bernal, 277
 Bernard v. Minshull, 192, 398, 399
 — v. Montague, 569
 Bernasconi v. Atkinson, 225, 226
 Berners, *Re*; Berners v. Calvert, 596
 Bernes, Stanley v., 3, 8
 Berrall, Harris v., 36
 Berridge, *In re*; Berridge v. Turner,
 295
 Berrige, Trafford v., 190

- Berriman v. Peacock, 426
 Berry v. Askham, 674
 — v. Berry, 247, 261, 359
 — v. Briant, 257, 556
 — v. Gibbons, 376
 — Gwynne v., 337, 583
 — Wyatt v., 27, 69
 Besant v. Noble, 679
 — v. Cox, 532
 Bescoby v. Pack, 162
 Best's Settlement, 289
 Best, Coldecott v., 468
 — v. Donmall, 145
 — Scott v., 143
 — v. Stonehewer, 270
 Bestall v. Bunbury, 18
 Bestwick, Thorpe v., 100
 Bewick v. Orpen, 183
 Bethell v. Abraham, 372, 626
 Bethune v. Kennedy, 120, 445
 Bettison, Doe d. Bromley v., 435
 Betts v. Doughty, 22, 72
 Bevan's Trusts, *In re*, 464, 466, 468
 Bevan v. A.-G., 116, 167
 — v. Bevan, 160
 — v. Mahon-Hagan, 452, 503
 — Prall v., 271, 272, 286
 — v. Waterhouse, 135
 — v. White, 419
 Beverley v. Beverley, 523
 — Garland v., 226, 276
 — Taylor v., 390, 555
 — Mayor of, v. A.-G., 309
 Bevis's Trusts, *Re*, 195
 Bewick v. Whitfield, 427
 Bewit, Whitfield v., 427
 Bewsey, Allen v., 74
 Beynon, Doe d. Thomas v., 221, 225
 Bianchi, *In bonis*, 8
 Bibbens v. Potter, 420, 519, 530
 Bibby v. Thompson, 404
 Bickham v. Crutwell, 136, 678
 Biddle v. Perkins, 479
 Biddles v. Biddles, 404
 Biddulph, Fell v., 643
 — v. Lees, 336, 578
 — v. Williams, 202
 Bide v. Harrison, 161
 Bial's Estate, *In re*, 665
 Bialby, Todd v., 660
 Bielefeld v. Record, 567
 Bifield's Case, 345
 Bigg, Brown v., 210
 — Coe v., 334
 Biggar v. Eastwood, 491, 668
 Biggs, Doe v., 358
 — v. Peacock, 371
 Bignall, Boreham v., 229
 Bignold, *In re*; Bignold v. Bignold, 151
 — v. Giles, 421
 Biles, Bench v., 673
 Bilke v. Roper, 60, 107
 Billing, Tucker v., 270
 Billing v. Welch, 504
 Billingham v. Vickera, 21
 Billings v. Sandom, 530
 Billington, Goodtitle v., 520
 Billson v. Crofts, 509
 Bindon, Lord, v. Earl of Suffolk, 529
 Bindon, Sweetapple v., 598
 Bingham, Cookson v., 329, 332
 — Ormaney v., 6
 — Wheeler v., 500
 Bingle's Trust, *Re*, 204
 Binns v. Nichols, 667
 — Swallow v., 471
 Birch v. Birch, 33
 — Birch-Wolfe v., 427, 428
 — v. Dawson, 164
 — v. Sherratt, 417
 — v. Wade, 273, 395
 — White v., 103
 Birchall, *In re*; Birchall v. Ashton, 360
 — *In re*; Wilson v. Birchall, 72
 — v. Ashton, 360
 — Wilson v., 72
 Birch-Wolfe v. Birch, 427, 428
 Bird, *In re*; Bird v. Cross, 495
 — *In re*; Pitman v. Pitman, 210
 — & Barnard's Contract, *Re*, 345
 — v. Harris, 401, 450
 — v. Hunsdon, 606
 — v. Johnson, 506
 — v. Luckie, 286
 — v. Maybury, 464
 — Morley v., 114
 — v. Peagram, 512
 — v. Wood, 285
 Birds v. Askey, 667
 Birdsall v. York, 252
 Birkhead, Doe d. Clift v., 537
 Birkett, *In re*, 308
 — Eccles v., 465
 — v. Vandercom, 16
 Birks, Parker v., 337, 574, 583
 Birmingham Canal Company v. Cartwright, 476
 Biron, *In re*, 269, 580
 Birt, *In bonis*, 33, 62
 Biscoe v. Jackson, 304, 305, 306, 320
 — v. Perkins, 358
 Bishop, *In bonis*, 27
 — Bayley v., 410
 — v. Cappel, 272
 — v. Curtis, 75
 — Sherer v., 249
 — v. Wall, 18
 Bishopp, Davenport v., 535
 — Sewell v., 376
 Bizzey v. Flight, 63
 Bjorkman v. Kimberley, Lord, 156
 Blachford, *In re*; Blachford v. Worsley, 150

- Black v. Jobling, 43
 — Twigg v., 648
 Blackall, Long v., 287, 291
 Blackburn, *In re*; Smiles v. Blackburn, 75, 107, 208
 — Byne v., 404
 — Guardhouse v., 22, 23
 — Hobson v. (1 Add. 274), 13
 — Hobson v. (1 M. & K. 571), 109, 171
 — Smiles v., 75, 107, 208
 — v. Stables, 353, 598
 Blacket v. Lamb, 91
 Blackhall v. Gibson, 341, 355, 356
 Blacklow v. Laws, 365, 512
 Blackman, *Re*, 223
 — v. Fysh, 262, 508
 — Hoste v., 195
 Blackmore, Chick v., 163
 — v. Snee, 556
 Blackwell, *In bonis*, 232
 — v. Bull, 274, 605, 606
 — v. Pennant, 228
 Blackwood v. Borrowes, 369
 Blagrove, Merlin v., 482
 — Powys v., 430
 Blagrove v. Coore, 130, 231
 — v. Blagrove, 360
 Blague v. Gold, 107
 Blaklock v. Grindle, 96
 Blake, *In re*; Jones v. Blake, 371
 Blake's Estate (19 W. R. 765), 237
 — Trust, *In re* (3 Eq. 799), 606
 Blake, Allgood v., 267, 278, 279, 325
 — Barnett v., 99
 — v. Blake (7 P. D. 102), 23
 — v. Blake (15 Ch. D. 481), 129, 131, 203
 — v. Bunbury, 93
 — Clarke v., 259
 — Cooke v., 361
 — v. Gibbs, 166
 — Jones v., 371
 — v. Knight, 28
 — v. Leigh, 97
 — v. Luxton, 74
 — Martin v., 155
 — Perrin v., 348
 — v. Peters, 424, 437
 — v. Shaw, 167
 — Southam v., 253
 Blakeney v. Blakeney, 395
 — Bostock v., 432
 — Watson v., 323
 Blakiston v. Haslewood, 248
 Blamire v. Geldart, 618
 — Mounsey v., 277, 279, 280
 Blanc, Trafford v., 4
 Bland v. Bland, 399
 — v. Dawes, 512, 513
 — v. Lamb, 186, 193
 — Taylor v., 665
 — v. Wilkins, 646
 Bland v. Williams, 467, 468
 Blandford v. Applin, 354
 Blane, Tomkyns v., 91
 Blaney, Kilford v., 675, 676, 678
 Blann v. Bell (2 D. M. & G. 775), 395, 444
 — v. Bell (7 Ch. D. 382), 657, 662
 Blasson v. Blasson, 259, 469, 471
 Blatch v. Wilder, 372
 Blayney's Trust, *Re*, 226
 Blayney, Walsh v., 544
 Blease v. Burgh, 257, 462
 Bleckley, *In bonis*, 43
 Blesard v. Simpson, 341, 574
 Blewitt, *In bonis*, 34
 — v. Roberts, 413
 Blight, *In re*; Blight v. Hartnoll, 524
 — v. Hartnoll (19 Ch. D. 294), 76, 413, 482
 — v. Hartnoll (23 Ch. D. 218), 194, 200
 — v. Hartnoll (13 Ch. D. 858), 524
 Blinston v. Warburton, 337, 584
 Blissett, Chapman v., 286
 Blizard, A.-G. v., 302
 — Bentley v., 242
 Blodwell v. Edwards, 245
 Blomfield v. Eyre, 525
 Blount v. Hipkins, 135, 678
 Blower's Trusts, 265
 Blower, Lampley v., 327, 393
 — v. Morret, 660
 Bloxam v. Favre, 3
 Bluett, *In bonis*, 81
 — Duncan v., 598
 — Muschamp v., 504
 Blundell's Trusts, *Re*, 300
 Blundell, Bootle v., 674, 678
 — Camoys v., 222
 — v. De Falbe, 569
 — Travers v., 108
 Blunt, Griffith v., 460
 Board v. Board, 437
 Boardman v. Stanley, 81
 Boards, *In re*; Knight v. Knight, 677
 Bockett, Cooper v., 26, 28, 33
 Boddam, Nevill v. (25 B. 554), 40
 — Nevill v. (28 B. 554), 553, 557, 616
 Boddington, *In re*; Boddington v. Clairat, 125, 227, 228
 — Webster v., 483, 484
 Boddy v. Dawes, 153
 Bodenham v. Fritchard, 173
 Bodens v. Lord Galway, 391
 Bodman, *In re*; Bodman v. Bodman, 164
 Boehm, *In bonis*, 23
 — Trafford v., 586
 Boetefeur, Lewis v., 668

- Boggia, Powell v., 280, 392
 Boldero, Lushington v., 428
 Bolding v. Strugnell, 464
 Bolitho v. Hillyar, 530, 547
 Bolton, *In bonis*, 70
 — *Re*; Brown v. Bolton, 238, 241, 242, 245, 246
 — v. Bolton (11 Ch. D. 968), 173
 — v. Bolton (L. R. 5 Ex. 145), 339
 — Brown v., 238, 241, 242, 245, 246
 — Doe d. Noble v., 358, 360
 — Parker v., 401, 598
 — Duchess of, Powlett v., 427
 — v. Stannard, 374
 — Townley v., 420
 — Duke of, Williams v., 427
 Bon v. Smith, 284
 Bonaker, New v., 310
 Bond, *In re*; Cole v. Hawes, 400
 — v. Seawell, 25
 Bone v. Cook, 641
 — Shergold v., 542
 — v. Spear, 12, 53
 Bonham, Henrion v., 297, 415
 Bonner, *In re*; Tucker v. Good, 266
 — v. Bonner, 126, 155
 — Fitzheury v., 608
 Bonsall, Leman v., 52
 Boucher v. Samford, 172
 Booker, *Re*; Booker v. Booker, 89, 154
 Bookey, Randall v., 653
 Boon v. Cornforth, 190
 Boosey v. Gardiner, 524
 — v. Gardner, 394
 Boote v. Dutton, 615
 Booth, *In re*; Booth v. Booth, 404, 415
 — *In re*; Fytton v. Booth, 290
 — v. Alington (6 D. M. & G. 613), 117
 — v. Alington (5 W. R. 811), 332
 — Beeston v., 661
 — v. Booth ([1894] 2 Ch. 282), 404, 415
 — v. Booth (4 Ves. 399), 463, 467
 — v. Carter, 319
 — v. Coulton (5 Ch. 684), 418
 — v. Coulton (7 Jur. N. S. 207), 445
 — v. Dean, 228
 — Fytton v., 290
 — Kirkman v., 382
 — v. Meyer, 495
 — Sillick v., 537, 559, 563
 — v. Vicars, 291
 Bootle, *In bonis*, 68
 — v. Blundell, 674, 678
 Boraston's Case, 415, 454
 Boreham v. Bignall, 229
 Borer, Ross v., 414
 Borlase v. Borlase, 36
 Borman, Scarborough v., 516
 Borradaile, Dormay v., 669, 672
 Borrell, Tufnell v., 329, 342, 551
 Borrer, Shaw v., 378, 671
 Borrowes, Blackwood v., 369
 Bortoft v. Wadsworth, 257
 Borton v. Dunbar, 190
 Borwell v. Abey, 421
 Bosanquet, *In bonis*, 27
 Bosnal v. Harvey, 350
 Bostock v. Blakeney, 432
 — v. D'Eyncourt, 334
 — Diamond v., 643
 Boswell v. Dillon, 597
 Botfield, Walcot v., 503
 Bothamley v. Sherson, 114, 134
 Bott, Carpenter v., 284
 — Gibson v., 149, 155, 447
 — Poole v., 460, 498
 Bouch, *In re*; Sproule v. Bouch, 441
 — v. Sproule, 441, 442
 Boughey v. Moreton, 46
 — Troutbeck v., 511
 Boughton v. Boughton (2 Ves. Sen. 12), 89, 96
 — v. Boughton (1 H. L. 406), 465, 482, 676, 677
 — Brudenell v., 54
 — v. James, 489
 — v. Knight (3 P. & D. 64), 14
 — Knight v. (3 B. 148; 11 Cl. & F. 513), 399
 Boulcott v. Boulcott, 615
 Boulton, A.-G. v., 304
 — Cherry v., 133
 Boulter, *In re*, 108
 — Waldron v., 253, 269
 Boulton v. Beard, 471
 — Keay v., 281, 540
 — v. Pilcher, 469
 — Raikes v., 663
 — Whytehead v., 551
 Bouquet, Fruer v., 654
 Bourke's Trusts, *In re*, 505, 529
 Bourke v. Griffith, 634
 — v. Ricketts, 154
 Bourne, *Re*; Bourne v. Brandreth, 165
 — *In re*; Martin v. Martin, 666
 — *In re* Rymer v. Harpley, 261, 359
 — v. Bourne, 210
 — v. Brandreth, 165
 — v. Buckton, 492
 — Dawson v., 326
 — Wills v., 668
 Bousfield, Marshall v., 598
 Bouskell, Campbell v., 344

- Bouverie v. Bouverie, 557, 565
 — Kensington v., 433, 434
 Bovill, A.-G. v., 302
 Boville, Emerson v., 56
 Bowchier v. Gordon, 256
 Bowden v. Bowden, 444
 — Gordon v., 416
 Bowen, *In re*; James v. James, 17
 — *In re*; Lloyd Phillips v. Davis, 476
 — v. Barlow, 171
 — v. Churchill, 480
 — Freeman v., 509
 — v. Lewis, 337, 338, 345, 579
 — v. Scowcroft, 531
 Bower, Airey v., 199, 200
 — Doe v., 103
 — v. Goslett, 519
 Bowers v. Bowers, 531, 532, 534, 557
 Bowes v. Bowes, 107
 — Strathmore v., 425
 Bowker v. Hunter, 654
 Bowles (Lewis) Case, 424, 427
 Bowles v. Bowles, 234
 — Carver v., 91, 487
 — v. Stewart, 436
 Bowman, *In re*; *In re* Lay; Whythead v. Boulton, 551
 — v. Hodgson, 69
 — Humble v., 76, 274
 — Mullen v., 401
 Bown, *In re*; O'Halloran v. King, 515, 516
 Bownas, Dunn v., 318
 Bowness, Dobson v., 175, 176
 Bowyer, A.-G. v., 305
 — v. Currall, 549
 — v. Douglass, 549
 — Newsome v., 18
 Box, *In re*, 135
 — v. Barrett, 69
 Boxer, Waters v., 149
 Boyce v. Boyce, 623
 — v. Corbally, 502
 Boyd, *Re*; Nield v. Boyd, 487
 Boyd's Settled Estates, *In re*, 379
 Boyd v. Allen, 371
 — v. Boyd (9 L. T. N. S. 166; 2 N. R. 486), 595
 — v. Boyd (4 Eq. 305), 632
 — Coote v., 124
 — Nield v., 487
 — Saunders v., 236
 Boydell v. Golightly, 280
 Boyer, Hickling v., 134, 430
 Boyes, *In re*; Boyes v. Carritt, 65
 — v. Bedale, 239
 — v. Carritt, 65
 — v. Cook, 199
 Boylan v. Fay, 377
 Boyle v. Boyle, 306
 — v. Bishop of Peterborough, 639
 Boyne, Brennan v., 337
- Boys v. Boys, 444
 — v. Bradley, 283
 — v. Morgan, 192
 — v. Williams, 115
 Boyse v. Rossborough, 22
 Boyton, Elve v., 379
 Boyville, Desbody v., 536
 Brabant, Doo v., 528
 Brabazon, *In re*, 458
 Brace, *In re*; Welch v. Colt, 202
 Bracebridge v. Cook, 331
 Brackenbury, A.-G. v., 199
 — v. Gibbons, 261, 521
 Bradbrook, *Re*, 430
 Bradbury, Mackenzie v., 613
 — Weld v., 255, 260
 Braddock, *In bonis*, 29
 Braddon v. Farrand, 653
 Bradford v. Brownjohn, 438
 — Buffar v., 346
 — Emmins v., 286
 — Farmer v., 203
 — v. Foley, 658
 — v. Young, 71, 101
 Bradish v. Ellames, 191
 Bradley, *In bonis*, 81
 — *Re*; Brown v. Cottrell, 288
 — Baker v., 516
 — v. Barlow, 470
 — Boys v., 283
 — Brock v., 527
 — v. Cartwright, 356
 — Doe d. Gigg v., 345
 — Lister v., 464
 — v. Peixoto, 505
 — v. Westcott, 196, 395
 — Wren v., 452
 Bradshaw v. Bradshaw, 226
 — v. Huish, 631
 — v. Jackman, 297, 301
 — v. Tasker, 299
 — Weldon v., 163
 Bradstreet, Shanvon v., 435
 Brady, Craven v., 497, 500, 507, 509, 647
 — Croker v., 651
 — v. Cubitt, 55
 Bragg v. Dyer, 52
 Braithwaite, Banks v., 156, 414
 — Reed v., 268, 572
 — Teasdale v., 401
 Brake, *In bonis*, 222
 Brame, Alexander v., 313, 314
 Bramham, Ringrose v., 248, 258
 Brancker, Cunliffe v., 261, 353, 359
 Brander v. Brander, 441
 Brandon v. Aston, 147, 148, 256
 — Basan v., 128
 — v. Brandon, 271
 — v. Robinson, 422
 Brandreth, A.-G. v., 301
 — Bourne v., 165
 — Byrom v., 158, 161
 — Lucas v., 209, 281
 Brane, Miall v., 94

- Branston v. Weightman, 244
 Branstrom v. Wilkinson, 464
 Brase, Pitcairne v., 223
 Brasenose Coll., A.-G. v., 309
 Brassey v. Chalmers, 367
 Bray, Hennessey v., 336
 — v. Stevens, 673
 Braybroke, Lord, v. Inskip, 185
 Brazier, Doe v., 605
 Breddon v. Page, 578
 Bree v. Perfect, 461, 468
 Brendon v. Tugman, 462
 Breeds' Will, *In re*, 385
 Bremmer v. Freeman, 3
 Bremner, Marshall v., 445
 Bremridge, Whitter v., 455
 Brennan v. Boyne, 337
 Brennan v. Brennan, 115, 301, 464
 Breslin v. Waldron, 228
 Brettnall, Warwicker v., 437
 Breton v. Mockett, 518
 — v. Vachell, 649
 Brett v. Horton, 252
 Brewer, Sidgreaves v., 64, 100, 188, 300
 Brewster, *Re*, 45
 — v. Angell, 602
 Briant, *In re*; Poulter v. Shackel, 133
 — Berry v., 257, 556
 Brickenden v. Williams, 200
 Bricker v. Whatley, 230
 Brickwood, Watson v., 676
 Bridge v. Abbott, 290
 — Huskinson v., 400
 — v. Chapman, 352
 Bridger, *In re*; Brompton Hospital for Consumption v. Lewis, 311
 — Grant v., 614
 — L. & S. W. R. Co. v., 357
 — v. Ramsay, 578
 Bridges v. Bridges, 187
 — Fordyce v., 476
 — v. Hales, 84
 — Michell v., 287
 — v. Strachan, 616
 Bridgman v. Dove, 669, 676
 — v. Fitzgerald, 164, 165
 Bridgnorth, Corporation of, v. Collins, 266
 Bridle, *In re*, 116, 129
 Brierley, *In re*; Brierley v. Brierley, 609
 — v. Brierley, 609
 — Fisher v., 125, 150
 Briesemann, *In bonis*, 69
 Brigg v. Brigg, 265, 281
 Briggs, *In re*; Briggs v. George, 659
 — Lady Langdale v., 106, 114
 — Martineau v., 616
 — v. Earl of Oxford, 479
 — v. Penny, 398, 647
 — v. Sharp, 169, 404
 — v. Upton, 291
 — White v., 274, 338, 400, 601
- Brighthouse, Spencer v., 147
 Bright v. Larcher, 211, 416, 677
 — v. Rowe, 536, 559
 — Wall v., 186
 — -Smith, *In re*; Bright-Smith v. Bright-Smith, 108, 170
 Brigstocke v. Brigstocke, 440
 Brindley v. Partridge, 377
 Brine v. Ferrier, 122, 123
 Briscoe, Barton v., 516
 Bristol, Countess of, v. Hungerford, 214, 401
 — Mayor of, A.-G. v., 308
 Bristow, A.-G. of British Honduras v., 177
 — v. Bristow, 125
 — Buckle v., 294
 — v. Masefield, 618
 — Monypenny v., 107
 — v. Skirrow, 202
 — v. Warde, 489
 — Weeds v., 266
 British Museum, White v. (6 Bing. 310), 29
 — v. White (2 S. & St. 594), 295, 312
 Britnell, Thomas v., 671
 Britten, Green v. (42 L. J. Ch. 187), 88, 320
 — Green v. (1 D. J. & S. 649), 446, 513
 — Morgan v., 328
 Brittlebank, *In re*; Coates v. Brittlebank, 387
 Britton, Potts v., 423
 — v. Twining, 392
 Broadbent v. Barrow, 304, 677, 678
 — v. Groves, 139, 218
 — Robertson v., 119
 Broadhurst v. Morris, 345
 Brock v. Bradley, 527
 Brockett, Chamberlayne v., 304, 306, 320
 Brocklehurst v. Flint, 637
 Brodie v. Barry, 96
 — v. Duke of Chandos, 319
 Brogden v. Brown, 15
 Bromfield v. Crowder, 454
 Bromhead v. Hunt, 612
 Bromley, *Re*; Sanders v. Bromley, 442
 — v. Bettison, 435
 — Chilcott v., 228
 — Fillingham v., 497
 — Sanders v., 442
 — v. Wright, 168, 596
 Brompton Hospital for Consumption v. Lewis, 311
 Bronsdon v. Winter, 113
 Brook's Will, *Re* (2 Dr. & Sm. 362), 420, 520
 — Will, *Re* (13 W. R. 573), 618
 Brook v. Badley, 312, 313, 314, 317
 — v. Brook, 341, 395
 — Fleming v., 165, 189

- Brooke, *In bonis*, 38
 — *In re*; Brooke v. Brooke, 359, 362, 384
 — *In re*; Brooke v. Rooke, 673
 — v. Astley, 578
 — v. Brooke, 359, 362, 384
 — Clifford v., 346
 — Dewar v., 461
 — Donoghue v., 268
 — Eccard v., 540
 — v. Garrod, 174
 — v. Kent, 38
 — Musgrave v., 506
 — v. Pearson, 422
 — Prentice v., 393
 — v. Rooke, 673
 — v. Turner (7 Sim. 671), 145
 — v. Turner (2 Bing. N. C. 422), 438
 — Lord, v. Earl of Warwick (2 De G. & S. 425), 130
 — Lord, v. Earl of Warwick (1 H. & T. 142), 675
 Brooker, Franks v., 229
 Brookes, Palin v., 110
 Brookfield, Dutton v., 376
 Brooking, Crook v., 64
 — Maybery v., 163
 — Peillon v., 514
 Brookman's Trust, *Re*, 639
 Brookman v. Smith, 277, 279, 522, 529
 — Violet v., 501
 Brooks, Keating v., 26
 — Maybank v., 638
 — Starkey v., 402
 — Tabor v., 385
 Brooksbank, *In re*; Beauchlerk v. James, 89
 Broom, Longmore v., 262, 539
 Brooman v. Withall, 139
 Broome v. Monck, 218
 — Weigall v., 181
 Brophy v. Bellamy, 386
 — Clinton v., 669
 Brotherton v. Bury, 535
 Brough, *In re*; Currey v. Brough, 615
 Broughton, *In re*; Peat v. Broughton, 509, 510
 — Donnelly v., 22
 — Gowan v., 657, 659
 — v. Langley, 348
 — Peat v., 509, 510
 Brouncker v. Ragot, 391
 Brown, *In bonis*, 57, 81
 — *In re*; Brown v. Brown, 544
 — *Re*; Penrose v. Manniug, 241
 — *Re*; Walsh v. Browne, 243
 Brown's Settlement, *In re* (10 Eq. 349), 370
 — Trusts, *In re* (1 K. & J. 522), 192
 Trust, *In re* (16 Eq. 239), 243, 574
 Brown's Trusts, *In re* (18 Ch. D. 61), 496, 502
 Brown v. Adv.-Gen., 10
 — v. Bamford, 517
 — Baxter v., 315
 — v. Bigg, 210
 — v. Bolton, 238, 241, 242, 245, 246
 — Brogden v., 15
 — v. Brown (8 E. & B. 876), 46, 47, 57
 — v. Brown (6 W. R. 613), 161, 163
 — v. Brown (58 L. J., Ch. 420), 544
 — v. Brown (1 Kee. 275), 661
 — v. Burdett, 475, 665
 — Caldecott v., 432
 — Cattlin v., 477, 483
 — Chancellor v., 332, 442, 443
 — Chapman v., 307, 317
 — Comfort v., 392
 — v. Cottrell, 288
 — Ethel, *In re*, 83
 — v. Farrant, 53
 — v. Fisher, 21
 — Garland v., 480, 481
 — v. Gellatly, 444, 446, 447
 — v. Higgs, 273, 609
 — Hill v., 338
 — Houghton v., 530
 — v. Jarvis, 253
 — Keeling v., 672
 — Mackleston v., 654
 — Mills v., 120
 — Oddie v., 479, 657
 — Osborn v., 536
 — v. Peek, 452
 — Pickford v., 665
 — v. Pocock, 263
 — v. Rigg, 564
 — Sheward v., 508
 — & Sibly, *In re*, 186, 486
 — v. Smith (15 B. 444), 6
 — v. Smith (10 Ch. D. 377) 386
 — v. Taylor, 167
 — Upton v. (12 Ch. D. 872), 285
 — Upton v. (26 Ch. D. 588), 441
 — v. Whiteway, 362
 — v. Wood, 281
 — v. Wooler, 458
 Browne's Will, *Re*, 411
 Browne, *Re*; Raggett v. Browne, 241
 — Barker v., 145
 — v. Browne, 453, 455
 — Clark v., 128
 — v. Collins, 144, 440
 — Everall v., 188
 — v. Greening, 102
 — Greville v., 659, 673, 677
 — v. Groombridge, 128, 248, 656, 665
 — v. Hammond, 457, 642
 — Hill v., 436
 — v. Hope, 640

- Browne, Knight *v.*, 422
 — Lambert *v.*, 357, 365
 — O'Toole *v.*, 176
 — *v.* Panll, 404
 — Raggett *v.*, 241
 — *v.* Rainsford, 552
 — *v.* Stoughton, 479
 — Thompson *v.*, 10
 — Torre *v.*, 155, 181, 416
 — Walsh *v.*, 243
 Browning, Harford *v.*, 293
 Brownjohn, Bradford *v.*, 438
 Brownlow (Earl), Egerton *v.*, 452, 497, 597
 Brownrigg, Campbell *v.*, 397
 — *v.* Pike, 68
 — Scott *v.*, 64, 65, 299
 Brownsmith, Wilson *v.*, 112
 Brownson *v.* Lawrance, 140, 142
 Brownsword *v.* Edwards, 570, 571
 Bruce *v.* Bruce, 6, 207
 — Jones *v.*, 678
 Brudenell *v.* Boughton, 54
 — *v.* Elwes, 481, 523
 Brudnell's Case, 420
 Brummel *v.* Prothero, 678
 Brunel *v.* Brunel, 4
 Bruno *v.* Eyston, 204
 Brunsden *v.* Woolridge, 302
 Brunt *v.* Brunt, 36
 Brunton, Mostyn *v.*, 464
 Bruton, Tarleton *v.*, 541, 641, 643
 Brutton, Winch *v.*, 399
 Bryan's Trust, 229
 Bryan, *In re*; Godfrey *v.* Bryan, 334
 — *v.* Collins, 235, 494
 — *v.* Collins, 491
 — Godfrey *v.*, 334
 — *v.* Twigg, 421
 — *v.* White, 69
 Bryant, *In re*; Bryant *v.* Hickley, 385
 — *v.* Easterson, 518
 — *v.* Hickley, 385
 — Owen *v.*, 243
 Bryce, *In bonis*, 24
 — Macdonald *v.* (2 Kee. 276), 490
 — Macdonald *v.* (16 B. 581), 555
 Bryden *v.* Willett, 268, 575
 Brydges *v.* Lande, 672
 — *v.* Phillips, 676
 — *v.* Wotton, 293
 Bryer, Shelley *v.*, 265
 Bryniug, Radfern *v.*, 622
 Bryon, *In re*; Drummond *v.* Leigh, 243
 Bubb *v.* Padwick, 568
 — Pride *v.*, 17
 — *v.* Yelverton, 293
 Buccleugh, Duchess of, *R. v.*, 169
 Buchanan, Fleming *v.*, 663
 — *v.* Harrison, 276
 — Russell *v.*, 454, 455
 — Trott *v.*, 675, 676
 Buck *v.* Barwise, 382
 — Lanphier *v.*, 334, 546
 — Turner *v.*, 149
 — Vaughan *v.*, 444
 — d. Whalley *v.* Nurton, 172
 Buckeridge *v.* Ingram, 54
 Buckland, Armstrong *v.*, 107
 — A.-G. *v.*, 302
 — *v.* Barton, 196
 — Court *v.*, 212
 Buckle, *In re*; Williams *v.* Marson, 157
 — *v.* Bristow, 294
 — *v.* Buckle, 53
 Buckley's Trusts, *In re*, 154
 Buckley *v.* Buckley, 141, 143, 409, 418, 623, 630
 — *v.* Howell, 364
 — *v.* Royal National Lifeboat Institution, 316
 — Radcliffe *v.*, 247
 — Earl of Stafford *v.*, 410
 Buckmaster's Estate, *Re*, 347
 — Hamilton *v.*, 175, 176
 Buckner, Doe d. Spearing *v.*, 176
 Buckton, Bourne *v.*, 492
 — *v.* Hay, 477
 Buckwell, Jupp *v.*, 230
 Budd, *In bonis*, 41
 — Moore *v.*, 6
 Buffar *v.* Bradford, 346
 Buggins *v.* Yates, 399
 Bull, *In re*; Cattv *v.* Bull, 136
 — Blackwell *v.*, 274, 605, 606
 — Catty *v.*, 136
 — *v.* Comberbach, 280, 392
 — Constable *v.*, 420, 519, 530
 — Doughty *v.*, 210
 — *v.* Kingston, 395
 — *v.* Pritchard, 461
 — *v.* Vardy, 609
 Buller, Flower *v.*, 18
 Buller's Estate, *Re*, 461
 Bulling *v.* Ellice, 227
 Bullmore *v.* Wynter, 229
 Bullock, *Re*; Good *v.* Lickorish, 407
 — *v.* Bennett, 500, 501
 — Devereux *v.*, 54
 — *v.* Downes, 282, 283, 288
 — Pigott *v.*, 427
 — Spencer *v.*, 472
 Bulmer, Child *v.*, 331
 — Clapton *v.*, 287
 Bult, Gough *v.*, 405, 406, 623
 Bulwer *v.* Astley, 433
 Bunbury's Trusts, *In re*, 293
 Bunbury, Bestall *v.*, 18
 — Blake *v.*, 93
 — *v.* Doran, 340
 — Knocker *v.*, 365
 — Ludlow *v.*, 504
 Bund *v.* Green, 649
 Bunn, *In re*; Isaacson *v.* Webster, 464, 465
 — Lord *v.*, 408

- Bunny v. Bunny, 43
 Bunting v. Marriott, 305, 317
 Burbey v. Burbey, 266
 Burbidge v. Burbidge, 166
 Burchell, King v., 356
 — McMahon v., 133, 134
 Burchett v. Durdant, 276
 — Goodfellow v., 626
 Burden v. Burville, 610
 Burdett, Brown v., 475, 665
 — O'Mahoney v., 525, 532
 — Powis v., 467, 470
 — v. Wrighte, 324, 339
 — v. Young, 619
 Burgess v. Burgess, 293
 — Carver v., 555, 558
 — Green v., 656
 — Knight v., 132
 — Ransome v., 385
 — v. Robinson, 496
 — v. Vinnicome, 100
 — v. Wheate, 650
 Burgh, Blease v., 257, 462
 Burgoyne v. Showler, 69
 Burke v. Annis, 339
 — Birmingham v., 669
 — Charles v., 202
 — v. Jones, 669
 — v. Moore, 24, 28
 — Robinson v., 198
 — Roseingrave v., 144
 Burkitt v. Chapman, 175
 Burley's Case, 353
 Burley v. Evelyn, 482
 Burlingham, Mann v., 317
 Burls v. Burls, 47
 Burnaby's Settled Estate, *In re*, 440
 Burnaby v. Equitable Reversionary
 Interest Society, 331
 Burne, Gillow v., 53
 — Hollier v., 438
 Burnell, Foley v., 439, 592, 593
 Burnet, Armstrong v., 135
 Burnett v. Mann, 16
 Burney, Abbas v., 477, 583
 Burnie v. Getting, 161
 — Moffatt v., 248, 420
 Burnsall, Doe d. Davy v., 326, 344
 Burra, Thompson v., 94, 95
 Burrell v. Baskerfield, 209, 473
 — v. Earl of Egremont, 435
 Burrin v. Chorlton, 345
 Burrough v. Philcox, 609
 Burrow's Trusts, 229
 Burrow, Hutchinson v., 106
 Burrowes v. Lord Clonbrock, 634
 Burrows v. Burrows, 53
 — Fleming v., 187, 189
 — Woolmore v., 274, 599, 601
 Burslem, Vaughan v., 592
 Burstall, Lightfoot v., 195
 Burt v. Arnold, 148
 — v. Hellyar, 274, 540, 545
 — *Re* Hutchings to, 516
 — Stannard v., 280, 556
 Burt v. Sturt, 492, 657
 Burtenshaw, Evans d. Weston v.,
 277
 — v. Gilbert, 46, 57
 Burton's Will, *In re*; Banks v.
 Heaven, 147, 148
 Burton v. Burton, 377
 — Keates v., 367
 — Morris v., 156
 — v. Mount, 444
 — v. Newbery, 60, 63
 — v. Power, 339
 — Swaine v., 277
 — v. White, 333
 Burville, Doe d. Burden v., 610
 Bury, Brotherton v., 535
 — Peyton v., 451, 496
 Bush, Adams v., 234
 — v. Cowan, 199
 — Davies v., 660
 — Morrow v., 675
 Bushell, *In bonis*, 23
 — Fairfield v., 268
 Busk, Addison v., 608
 — v. Aldam, 208
 Bussell v. Marriott, 52
 Bussey, Hodgeson v., 391
 Bustard v. Saunders, 327
 Buston, Mounsey v., 394
 Butcher, *Ex parte*; *In re* Mellor, 382,
 384
 — Ommaney v., 158, 192, 299,
 306, 654
 — Smith v., 280
 Buts, *In re* Marquess of; Marquess
 of Buts v. Ryder, 437, 594
 — Marquis of, Stuart v., 189
 Butler's Trusts, *In re*; Hughes v.
 Anderson, 331
 Butler, *In re*; Le Bas v. Herbert,
 658, 663
 — Aikin v., 446
 — v. Butler, 176, 183
 — Clarke v., 119
 — Cunningham v., 108
 — Falkner v., 191, 265
 — Gerrard v., 397
 — v. Gray, 207, 397, 610
 — Izou v., 639
 — v. Lowe, 258, 264
 — Quinn v., 40, 616
 — Sadlier v., 93
 — Smith v., 158, 161
 — v. Stratton, 270
 — Vinnicomb v., 69
 Butlin, Barry v., 21
 Butt's Case, 410, 413
 Butt v. Thomas, 603
 Butter v. Ommaney, 393, 544
 Butterfield v. Butterfield, 391
 — Urquhart v., 5
 Butterworth, Knight-Bruce v. 208
 Buttery v. Robinson, 409
 Butts, Trower v., 259
 Buxton, Nottage v., 471

- Byam v. Byam, 367
 — v. Munton, 212
 Byne v. Blackburn, 404
 — v. Currey, 155
 Byng v. Byng, 346
 — Fraser v., 123
 — v. Lord Strafford, 519
 — Webb v., 102, 106, 170
 Byram v. Tull, 230
 Byrd, *In bonis*, 26, 30
 Byrne's Estate, *In re* (29 L. R. Ir. 250), 403
 Byrne, *In re* (23 L. R. Ir. 260), 466
 — Hogan v., 297
 Byrnes, *In re*, 83
 Byrom v. Brandreth, 158, 161
 Byron's Settlement, *In re*; Williams v. Mitchell, 198
 Byron, Leigh v., 240
 Bythessea v. Bythessea, 575
 Bywater, *In re*; Bywater v. Clarke, 72, 617

 CABBURN, *Re*; Gage v. Rutland, 458
 Cable v. Cable, 288
 Caddell, French v., 583
 Cade, Bell v., 464
 Cadell v. Palmer, 475, 480
 Cadett v. Earle, 164
 Cadge, *In bonis*, 33
 Cadman v. Cadman, 218, 387
 Cadogan, *In re*; Cadogan v. Palagi, 159
 — Ames v., 205
 — v. Ewart, 359, 360
 — Lord, Lord Montford v., 436, 437
 — v. Palagi, 159
 Cadywold, *In bonis*, 35, 55
 Cafe v. Bent (8 Ha. 245), 372
 — v. Bent (5 Ha. 24), 445
 — Doe d. Kimber v., 361
 Caffray, Kinsella v., 609
 Caldecott v. Brown, 432
 — v. Caldecott, 443, 444
 — v. Harrison, 266
 Caldwell v. Cresswell, 452, 502
 — v. Fellowes, 330
 Calees, Jones v., 657
 Caley, Waldo v., 310
 Callagher, Courtenay v., 414
 Callaway, *In bonis*, 70
 Callender, Wright v., 412, 416, 417
 Callow, Allen v., 123, 124
 — v. Callow, 162
 — Nelson v., 479
 Calmady, Freke v., 89, 209, 381, 430, 431
 Calvert v. Armitage, 668
 — Berners v., 596
 — Jackson v., 394
 — v. Sibbon, 292
 — Wrightson v., 250
 Cambridge v. Rous (8 Ves. 14), 188, 529
 Cambridge v. Rous (25 B. 409, 574), 396, 526, 536, 558
 Camden, Lord, Garrick v., 282
 — Marquis, v. Murray, 371
 — Marquis of, Walker v., 289, 291
 Cameron, *In re*; Nixon v. Cameron, 382, 670
 Camm, Goulder v., 513, 516
 Camoys v. Blundell, 222
 — Lord, Tempest v., 371
 Camp v. Coe, 653
 Campbell's Trusts, *In re*, 254
 Campbell, *In re*; Campbell v. Campbell ([1893] 2 Ch. 206), 140
 — *In re*; Campbell v. Campbell ([1893] 3 Ch. 468), 389
 — v. Bouskell, 344
 — v. Brownrigg, 397
 — v. Campbell ([1893] 2 Ch. 206), 140
 — v. Campbell (4 B. C. C. 15), 332
 — v. Campbell ([1893] 3 Ch. 468), 389
 — v. Campbell (L.R. 1 Eq. 383), 625
 — Candy v., 584
 — v. French, 617
 — v. Harding, 581
 — v. M'Conaghy, 670
 — v. M'Grain, 189, 190
 — Mansergh v., 413, 414
 — Menteith v., 17, 18, 19
 — v. Prescott, 188
 — v. Radnor, Earl of, 124
 — v. Sandys, 74
 — Smith v., 271
 — v. Wardlaw, 430
 Cancellor v. Cancellor, 251, 344
 Cancer Hospital, Jeffery v., 34
 Candler v. Smith, 350
 Candy v. Campbell, 584
 Cane, *In re*; Ruff v. Silvers, 457
 Cann, Ware v., 504
 Cannon v. Rucastle, 340
 Canterbury, Archbishop of, Paice v., 310, 313, 617
 — Mayor of, v. Wyburn, 321
 Cantillon's Minors, *In re*, 463
 Capdevielle, *In re*, 4
 Cape v. Cape, 325, 513
 Capel v. Girdler, 131
 — v. Wood, 436
 Caplin's Will, *Re*, 204, 271, 273
 Cappel, Bishop v., 272
 Capper, Coulson v., 505, 508
 — Fry v., 487
 Capron v. Capron, 144
 Carberry v. M'Carthy, 610
 Carbery v. Cox, 305
 — (Lord), Freke v., 1, 476
 Carden v. Tuck, 171
 Cardigan v. Curzon-Howe (30 Ch. D. 530), 372
 — v. Curzon-Howe (9 Eq. 358), 581
 — Eales v., 421
 Cardross' Settlement, *In re*, 368

- Careless v. Careless, 222, 223
 — Rachfield v., 653, 654
 Carey v. Carey, 539
 Carew, Lloyd v., 348
 Carlisle, Earl of, Lechmere v., 210
 Carlton v. Carlton, 3
 Carlyon v. Truscott, 359, 371
 Carmarthen, Lord, Lady Holderness v., 410
 Carmichael v. Gee, 417
 Carne v. Long, 98, 296, 477
 Carpenter, *Re*; Carpenter v. Disney, 87
 — v. Bott, 284
 — v. Disney, 87
 Carr v. Bedford, 302
 — v. Carr, 161
 — v. Collins, 215
 — v. Eastbrooke, 630
 — v. Errol (Earl of), 590, 592
 — v. Griffith, 145
 — v. Ingleby, 412
 — Lloyd v., 449
 — Messeena v., 411
 Carrick v. Errington, 647
 — Ralph v., 268, 270, 494, 604, 606, 657
 — Wandesforde v., 588
 Carrier v. Price, 98, 297, 420
 Carrington (Lord) v. Payne, 616
 — Pearce v., 269
 Carritt, *In bonis*, 60
 — Boyes v., 65
 Carron Company v. Hunter, 144
 Carte v. Carte, 131
 Carter, Barnardiston v., 523
 — v. Bental, 269
 — Booth v., 319
 — v. Carter, 507
 — v. Church, 415
 — Coulthurst v., 543
 — Farrant v., 168
 — Gosling v., 374
 — r. Green, 320
 — Lovejoy v., 247
 — Nelson v., 114, 117
 — v. Salt, 417
 — v. Taggart, 121, 191
 — White v., 598
 — Wyman v., 360
 Carthew v. Enraght, 262, 609
 Cartier, Howgrave v., 470
 Cartwright, Birmingham Canal Company v., 476
 — Bradley v., 356
 — v. Cartwright (1 Phillim. 90), 16
 — v. Cartwright (3 D. M. & G. 982), 497
 — Corser v., 374
 — Hibblethwait v., 247
 — Taylor v., 634
 — v. Vaudry, 240
 Carus, Townsend v., 295
 Caruth v. Parker, 294
 Carver v. Bowles, 91, 487
 — v. Burgess, 555, 558
 Carveth v. Heiron, 285
 Carwardine v. Carwardine, 520
 Cary v. Abbot, 800
 Casamajor v. Strobe, 574
 Casborne v. Scarfe, 184
 Case v. Drosier, 479
 Casement v. Fulton, 24, 29
 Casmore, *In bonis*, 25
 Casson v. Dade, 29
 Casterton v. Sutherland, 263
 Castle v. Eate, 416
 — v. Fox, 105, 111
 — v. Gillett, 673
 — Torre v., 12, 54
 Castledon v. Turner, 224
 Cathcart, Hood-Barrs v. ([1894] 3 Ch. 376), 517
 — Hood-Barrs v. ([1894] 2 Q. B. 559), 517
 Catherine Hall, A.-G. v., 505
 Catlow, Peel v., 543
 Cator, Sparkes v., 626
 Catt's Trusts, 506
 Cattley v. Vincent, 524
 Cattlin v. Brown, 477, 483
 Catty v. Bull, 136
 Caulfield v. Maguire, 433
 — Turner v., 519
 Caunt, Gibbons v., 55
 Causton, Elwes v., 120
 Cantley, *Re*, 163, 186
 — Foster v., 637
 Cavan, Lady, v. Pulteney, 91
 Cave v. Cave, 75
 — Farquharson v., 10
 — v. Harris, 103
 Cavendish v. Cavendish (30 Ch. D. 227), 163
 — v. Cavendish (10 Ch. 319), 370
 — v. Dacre, 87, 90, 91
 — Lowther v., 452
 Cawood v. Thompson, 320
 Cawston, Courtauld v., 195
 Cayley, Phillips v., 198
 Cazenove v. Cazenove, 660
 Chadock v. Cowley, 585
 Chadwick, Bamford v., 582
 Chadwin, *Ex parte*, 388
 Chaffers v. Abell, 462
 — Howard v., 671
 Chainé, O'Hara v., 95
 Chalie, Maitland v., 574
 Chalk, Roose v., 652, 654
 Challenger v. Shepherd, 340
 Challis, Doe d. Evers v., 482, 522, 523
 Chalmer, Anstruther v., 3
 — Douglas v., 530
 Chalmers, Brassey v., 367
 — v. North, 288
 — v. Storil, 94
 — v. Wingfield, 8
 Chamberlain v. Hutchinson, 200

- Chamberlayne v. Brockett, 304, 306,
 320
 — v. Chamberlayne, 353
 — v. Dummer, 425
 — Phillips v., 394
 — Robinson v., 53
 Chamberlin v. Springfield, 606
 Chambers v. Chambers, 117
 — v. Goldwin, 152
 — Gratrix v., 412
 — Jacques v. (2 Coll. 435), 109
 — Jacques v. (4 Railw. Ca. 499),
 185
 — Manning v., 509
 — v. Smith, 408
 — v. Taylor, 276
 Chambres, Norris v., 20
 Chamier, Fuller v., 353
 Chamney, *In bonis*, 29
 Champ v. Champ, 609
 Champion, *In re*; Dudley v. Cham-
 pion, 106, 107
 — Edwards v., 329
 Champney v. Davy, 192, 307, 319, 323
 Champneys, Mostyn v., 179
 Chancellor, *In re*; Chancellor v.
 Brown, 382, 442, 443
 Chancey's Case, 631
 Chandler v. Howell, 315
 — v. Pocock, 203
 Chandless v. Price, 391
 Chandos, Duke of, Brodie v., 319
 — Freeman v., 180
 — v. Talbot, 459
 Channon v. Patch, 426
 Chantepredrix, Wiley v., 549
 Chaplin's Trust, *Re*, 645
 Chaplin, Bashford v., 595, 622
 — v. Chaplin, 410
 Chapman's Case, 273
 Chapman's Will, 545
 Chapman, *In bonis*, 58
 Chapman, *In re*; Ellick v. Cox, 233
 — Arnold v., 646, 658
 — v. Blissett, 256
 — Bridge v., 352
 — v. Brown, 307, 317
 — v. Chapman (4 Ch. D. 800),
 187
 — v. Chapman (33 B. 556), 290
 — Doe d. Burkitt v., 175
 — Forth v., 582
 — v. Hart, 130, 158, 165
 — Heath v., 300
 — Hill v., 255, 256
 — *In re* Hill to, 558, 559
 — Howes v., 316, 656, 659
 — Maddeson v., 92
 — Maddison v., 456, 457, 466
 — Miller v., 539
 — Newton v., 389
 — Nugee v., 188, 635
 — Peat v., 638
 — v. Reynolds, 158
 — v. Wood, 516
 Chappell, *In bonis* John, 222, 225
 — v. Charlton, 18
 Chapple, *In re*; Newton v. Chap-
 man, 389
 Charge v. Goodyer, 266
 Charlemont v. Spencer, 17
 Charles v. Burke, 202
 — Evans v., 292
 — Smith v., 570
 Charlton, Chappell v., 18
 — v. Coombes, 500
 — Hindmarsh v., 27, 30
 — v. Rendall, 600
 Charmer, Kell v., 101, 221
 Charter v. Charter, 222, 225, 226
 Chaston, *In re*; Chaston v. Seago,
 537, 554, 567
 Chatfield v. Berchtoldt, 421
 Chattaway, Salt v., 212, 676
 — v. Smith, 273
 Chatteris v. Young, 126
 Chaudière Mining Co. v. Desbarats, 98
 Chawner's Will, *In re*, 375
 Chaworth v. Beech, 116
 Cheek, Stokes v., 411
 Cheeka, Luxford v., 450, 457
 Cheese, Culsha v., 638
 — v. Lovejoy, 44
 — Tench v., 490, 676
 Cheevers, Murphy v., 300
 Chell, Russell v., 132, 566
 Chellen v. Martin, 456
 Cheney's Case, 223
 Chennell, Welch v., 386
 Cherry v. Boultsbee, 133
 — v. Mott, 305
 Chesham, Lord, *In re*; Cavendish v.
 Dacre, 87, 90, 91
 Cheshire, Hunter v., 544
 Cheslyn, Cresswell v., 194, 644, 656
 Chester, Bishop of, A.-G. v., 305
 — v. Chester (3 P. W. 56), 179,
 180
 — v. Chester (12 Eq. 444), 313,
 322, 652
 — v. Painter, 152
 — v. Phillips, 280
 — v. Powell, 136
 Chesterfield's Trusts, *In re* Earl of,
 448
 Chestnut, Wilson v., 586
 Chetwynd v. Morgan, 16
 Chevalier v. Huthwaite, 226
 Cheyne, Eccles v., 642
 Chichester, Lord, v. Coventry, 627,
 628
 — Doe v., 89
 — French v., 675
 — v. Oxenden, 102
 Chick v. Blackmore, 163
 Chidgey v. Harris, 324
 — v. Whitby, 152
 Chilcott v. Bromley, 223
 Child v. Bulmer, 331
 — v. Child, 379

- Child v. Giblett, 536
 — Johnson v., 136
 Childe, *In re*; Childe-Pemberton v. Childe, 345
 Childe-Pemberton v. Childe, 345
 Childers, Mackenzie v., 475
 Children, Paul v., 241
 Chinery, *In re*; Chinery v. Hill, 544
 Chinnery's Estate, *In re*, 576
 Chitty v. Parker, 214, 215
 — White v., 510
 — Williams v., 528, 658
 Choat v. Yeates, 656
 Cholmeley, Cockerell v., 364
 — v. Paxton, 364
 Cholmondeley v. Cholmondeley, 403
 — Earl, v. Weatherby, 180
 Chorley v. Loveland, 285
 Chorlton, Doe d. Burrin v., 345
 Christian, *In bonis*, 80
 — v. Devereux, 294
 — Hull v., 415
 Christie v. Barker, 432
 — v. Gosling, 485, 593, 597, 599
 Christmas, *In re*; Martin v. Lacon, 316
 — v. Whinyates, 33
 Christopher v. Christopher, 55
 Christopherson v. Naylor, 544
 Christ's Hospital v. Grainger, 476
 Christy, Rycroft v., 512
 Church, Carter v., 415
 — v. Mundy, 180
 — v. Tyacke, 551
 Churcher v. Martin, 324
 Churchill, Bowen v., 480
 — v. Churchill, 91, 397
 — v. Dibbin, 197
 — v. Marks, 504
 — Oxford v., 267
 — v. St. George's Hospital, 128
 — Worlidge v., 537, 559
 Churchman v. Ireland, 95
 Circuit v. Perry, 193, 613
 Clache's Case, 611
 Clairat, Boddington v., 125, 227, 228
 Clancarty v. Clancarty, 398
 Clancy, *Re*, 318
 Clapham, Hood v., 444
 Clapton v. Bulmer, 287
 Clare, Crossley v., 270
 Claridge v. Arnold, 340
 — Doe v., 362
 Clark's Estate, *Re* (3 D. J. & S. 111), 248, 549
 — *In re*; Maddick v. Marks, 198
 Clark's Trust, *In re* (1 Ch. D. 497), 296, 297, 477
 Clark, *Re* (11 W. R. 871), 612
 — *In re*; Clark v. Randall, 647
 — *In re*; Husband v. Martin, 318
 Clark v. Browne, 128
 — Dew v., 14
 — v. Dixon, 44
 — v. Henry, 532, 533, 535
 — McClellan v., 114, 116
 — Padbury v., 93
 — v. Phillips, 645
 — v. Randall, 647
 — v. Royal Panopticon, 375
 — v. Seymour, 369
 — Smart v., 530
 — v. Taylor (1 Dr. 642), 304
 — Taylor v. (1 Ha. 161), 447
 — Williams v., 462
 Clarke's Case, 24
 — Trusts, *In re* (21 Ch. D. 748), 515
 Clarke, *In bonis*, 24
 Clarke, *In re* (21 Ch. D. 817), 86
 — *In re*; Barker v. Perowne, 145, 447
 — v. Abbott, 184
 — v. Berkeley, 501
 — v. Blake, 259
 — v. Butler, 119
 — Bywater v., 72, 617
 — v. Clarke (5 L. R. Ir. 47), 69
 — v. Clarke (1 R. 2 C. L. 395), 75
 — v. Clarke (8 Sim. 59), 258
 — v. Clemmans, 638
 — v. Colla, 285
 — Counden v., 273, 277
 — Dawson v., 401, 652
 — De Serre v., 474
 — Dicken v., 456
 — Doe v., 259
 — Eastwood v., 372
 — Fenwick v., 662
 — v. Hayne, 288
 — v. Hilton, 401, 647
 — Hodgson v., 226
 — v. Hogg, 387
 — Holloway v., 55
 — v. Lubbock, 536
 — v. Ludlam, 181
 — Mason v., 325
 — Newton v., 29
 — v. Parker, 501, 502
 — Penny v., 333
 — Pigg v., 274
 — Prevost v., 400, 403
 — v. Scripps, 45
 — v. Sewell, 151
 — Tate v., 356, 393
 Clarkson v. Clarkson, 37
 — Grayburn v., 377
 — Holloway v., 396
 — Rymer v., 52
 — Surridge v., 270
 Claus, *In bonis*, 69
 Clavering, Armstrong v., 227
 — v. Clavering, 429
 — v. Ellison, 497, 503
 Claxton, Smith v., 214
 — Wardle v., 513

- Clay, *In re*; Clay v. Clay, 292
 — and Tetley, *In re*, 373, 374
 — v. Clay, 292
 — v. Coles (W. N. 1880, 145), 415
 — v. Coles (57 L. T. 682), 575
 — v. Pennington, 393, 543
 — v. Rufford, 369
 Claydon, Wheeler v., 670
 Clayton, Doe v., 338
 — v. Gregson, 101
 — v. Gresham, 441
 — Leavers v., 298, 306
 — v. Lowe, 534
 — v. Lord Nugent, 102, 221
 Cleare v. Cleare, 14, 21
 Cleary's Trust, 345, 392
 Cleator, Robinson v., 406
 Cleaveland, King v., 289, 290, 291
 Cleaver v. Spurling, 500
 Cleghorn, Moore v., 340
 Cleland's Trusts, *In re*, 540
 Clement, Addis v., 182
 — Essex v., 560
 — Freme v., 204
 Clements, *In bonis*, 43
 — *In re*; Clements v. Pearsall, 146, 153
 — v. Pasko, 578
 — v. Pearsall, 146, 153
 — v. Ward, 322
 Clemmans, Clarke v., 638
 Clemment, Whitfield v., 405
 Clemow, Francis v., 673
 Clennell v. Lawthwaite, 653
 Clergy Society, *Re*, 305
 Clerk v. Clerk, 331
 Clerke v. Clerke, 80
 — v. Day, 353
 Clery v. Barry, 69
 Cleveland's Estate, *In re* Duke of;
 Wolmer v. Forester, 145
 — Settled Estates, *In re* Duke of,
 203
 Cleveland, King v., 540
 — Duchess of, v. Meyrick, 164
 Clibborn v. Clibborn, 193
 Cliff's Trusts, *In re*, 70
 Clifford v. Beaumont, 501
 — v. Brooke, 346
 — v. Clifford, 199, 203
 — v. Koe, 346
 — v. Lewis, 671
 Clift v. Birkhead, 537
 Clifton v. Goodbun, 241
 — University of Oxford v., 344
 — Wintour v., 93
 Clinch, Southgate v., 279
 Cline's Estate, *In re*, 144
 Clinton v. Brophy, 669
 — Baroness, Kerr v., 617
 Clitheroe, Middleton v., 320
 Clive v. Clive (Kay, 600), 135, 144
 — v. Clive (7 Ch. 433), 145, 602
 — Thompson v., 546
 Cloak v. Hammond, 222, 267
 Clogstoun v. Walcott, 206
 Clonbrock, Lord, Burrowes v., 634
 Cloncurry, Lord, De Roeback v.,
 158
 Close, Halford v., 490
 Clough v. Clough, 17, 128
 — v. Wynne, 394
 Cloves v. Awdry, 204
 Clowdsley v. Pelham, 672
 Clowes, *In re*, 132, 134
 — Crowder v., 125, 126
 — v. Hilliard, 287
 Clovne, Bishop of, v. Young, 653
 Clulow's Trust, *Re*, 493, 494
 Clune v. Apjohn, 637
 Clutterbuck v. Clutterbuck, 679
 — v. James, 508
 Coard v. Holderness, 176
 Coates, Armitage v., 477
 — v. Brittlebank, 387
 — Gregg v., 430
 — v. Hart, 570, 612
 — v. Mackillop, 296, 319
 — Nash v., 349
 — v. Needham, 416
 — v. Stevens, 75, 92
 Cobb, Rishton v., 394
 Cochrane v. Cochrane, 479
 Cock v. Cock, 605
 — v. Cooke, 11
 — v. Cooper, 354
 Cockayne v. Harrison, 518
 Cockcroft, *In re*; Broadbent v.
 Groves, 139, 218
 Cockell, Rich v., 96
 Cocker, Lloyd v., 387
 Cockeram, Evans v., 136, 679
 Cockerell v. Barber, 293
 — v. Cholmeley, 364
 — v. Earl of Essex, 130, 155,
 156, 592, 599
 — Garrett v., 585
 — Stuart v., 480, 482
 Cockill, Nickisson v., 660, 663
 Cockrell v. Cockrell, 7
 Cocks, Barker v., 535
 — v. Mannors, 98, 296, 297
 — Simmonds v., 454
 Cockshott v. Cockshott, 606
 Codrington, All Souls Coll. v., 110
 Coe's Trust, 408
 Coe v. Bigg, 334
 — Camp v., 653
 Coffin v. Coffin, 425
 Cofield v. Pollard, 200
 Cogan v. Duffield, 600
 — v. Stevens, 214, 215
 Coghlan, Inglefield v., 513
 Coke, Parsons v. (4 Dr. 296), 393
 — Parsons v. (6 W. R. 715), 415
 Colbeck, Jones v., 272
 Colberg, *In bonis*, 44
 Colclough v. Colclough, 338, 354, 356
 Coldecott v. Best, 468

- Coldwell v. Holme, 305
 Cole's Will, 156
 Cole, Adnam v., 122, 298, 307
 — v. Fitzgerald, 164, 190
 — v. Goble, 582
 — v. Hawes, 400
 — v. Scott, 106
 — v. Sewell, 478
 — v. Wade, 272
 — v. Willard, 631
 Coleby v. Coleby, 139
 Colegrave v. Manby, 131
 Coleman, *In re*; Henry v. Strong,
 407, 408
 — Baile v., 348
 — Horn v., 283
 — and Jarrom, *In re*, 643
 — v. Seymour, 234, 262
 Coles, *In bonis*, 11
 — Clay v., 415, 575
 — v. Courtier, 431
 — Incorporated Church Building
 Society v., 312, 323
 — Wilson v., 215
 Colgan, *In re*, 386
 Colleton v. Garth, 130
 Collett v. Collett, 495, 573
 — Thrupp v., 227, 228, 300, 308
 Colley, *In bonis*, 67
 Colley's Trusts, *Re*, 643
 Collier, Lantsbury v., 370, 480
 — v. McBean, 348
 — v. Squire, 189
 — v. Wakeman, 211
 — v. Walters, 361
 Collin, Wilkes v., 160, 171
 Collingwood v. Pace, 281
 — v. Row, 217
 — v. Stanhope, 236
 Collins' Trusts, *In re*, 282
 Collins, *In re*; Collins v. Collins,
 386
 — Austen v., 503
 — Browne v., 144, 440
 — Bryan v., 235, 491, 494
 — Carr v., 215
 — v. Collins (12 Eq. 455), 158
 — v. Collins (32 Ch. D. 229),
 386
 — v. Collins (2 M. & K. 703),
 446
 — Corporation of Bridgnorth v.,
 266
 — Doe v., 171
 — v. Doyle, 161
 — v. Elstone, 23
 — Fox v., 224
 — Howard v., 554, 558
 — v. Lewis, 659, 667
 — v. Macpherson, 563
 — Tolson v., 630
 — White v., 353, 354
 Collinson v. Pater, 314
 Collis, Doe d. Cooper v., 355
 — v. Robins, 676, 678
 Collison, *In re*; Collison v. Barber, 567
 Colls, Clarke v., 285
 Colman, *In bonis*, 29
 — Cruwys v., 275
 — Smith v., 533
 — v. Tyndall, 361
 Colpoys v. Colpoys, 115
 Colquhoun, Wroughton v., 412, 416
 Colshead, *Re*, 595
 — Wall v., 212
 Colston v. Roberts, 141
 Colt, Toldervy v., 524
 — Welch v., 202
 Coltman, Davenport v., 168, 214
 Colton, Greetham v., 670
 Coltsmann v. Coltsmann, 337, 338,
 583
 Colville v. Middleton, 675
 Colville, Tullett v., 477, 480, 544
 — v. Middleton, 118
 Colvin v. Fraser, 46
 Colyear, Doe d. Lindsey v., 279
 Colyer, *Re*, 518
 — *Re*; Millikin v. Snelling, 126,
 519
 — v. Finch, 373, 375
 Combe, Finch v., 34
 — Hawkins v., 147
 — v. Hughes, 326, 327, 494
 — Ward v., 441
 Comber's Settlement, *Re*, 207
 Comber v. Graham, 395
 Comberbach, Bull v., 230, 392
 — v. Perryn, 577
 Combes, Waite v., 159, 161
 Comfort v. Brown, 392
 Commercial Bank of Sydney, Tarn v.,
 71
 Commissioners for special purposes of
 Income Tax v. Pemsel, 295
 Commissioners of Charitable Dona-
 tions v. Cotter, 563
 — v. De Clifford, 478
 — v. Deey, 274
 — v. Sullivan, 303
 — v. Walsh, 300
 Compere v. Hicks, 361
 Comport v. Austen, 460
 Compton, Oxenden v., 426
 — Right d. Compton v., 339
 — Yates v., 365, 367, 410
 Conder, Smith v., 64, 635
 Conduitt v. Soane, 256, 439
 Coney, Smith v., 226
 Congreve, Douglas v., 349
 — v. Palmer, 254, 539, 543
 Conmee, Taaffe v., 549
 Connellan's Trust, *In re*, 550
 Conner, Jeffreys v., 575
 Connolly v. Connolly, 330, 518
 — Beale v., 564
 Connor, *In re* (2 J. & Lat. 456), 243,
 245
 — *Re* (8 Ir. Eq. 401), 248
 Conolly v. Vernon, 103

Conquest v. Conquest, 618
 Conron v. Conron, 670
 Conssett v. Bell, 10
 Constable v. Bull, 420, 519, 530
 — v. Constable, 144
 — Henderson v., 608
 — v. Steibel, 52
 Conway v. Fenton, 381
 Cooch v. Walden, 103
 Cood, *In bonis*, 63
 Coogan v. Hayden, 275
 Cook, Begley v., 422
 — Bone v., 641
 — Boyes v., 199
 — Bracebridge v., 331
 — v. Cook, 260, 267, 329
 — v. Danvers, 223
 — v. Dawson, 672
 — East v., 88
 — Foster v., 658, 667
 — v. Gerard, 605
 — Hogg v., 265
 — Hudson v., 218
 — Idle v., 336, 337, 579
 — v. Jaggard, 177
 — v. Lambert, 29
 — Sibley v., 640
 — Studd v., 161
 Cooke's Contract, *In re*, 367, 370
 Cooke, Barton v., 405
 — v. Blake, 361
 — Cock v., 11
 — v. Cooke, 487
 — v. Crawford, 78
 — v. Cunliffe, 206
 — v. Dealey, 219
 — Doe d. Everett v., 570, 571
 — Gonne v., 569
 — Hibbert v., 432
 — Illingworth v., 221
 — Jameson v., 52
 — Lea v., 295, 309
 — v. Mirehouse, 572
 — Oates v., 357
 — Perkins v., 416, 417
 — Sandes v., 354, 356
 — Searle v., 432
 — v. Stationers' Company, 646
 — Sutherland v., 119, 445
 — v. Turner, 497, 498
 — v. Wagster, 159
 Cookson v. Bingham, 329, 332
 — v. Hancock, 126
 — v. Reay, 211
 Coombe, A.-G. v., 301
 Coombes, *In re*; Coombes v. Parfitt,
 515
 — Charlton v., 500
 — v. Parfitt, 515
 Coombs, *In bonis*, 25
 — v. Queen's Proctor, 19
 Cooney v. Nicholls, 167
 Cooper, *In bonis*, 18
 — *In re*; Cooper v. Slight, 363,
 337

Cooper's Trusts, *In re*, 646
 Cooper & Allen, *In re*, 370
 — Aldrich v., 658
 — Balfour v., 154
 — v. Bockett, 28, 33, 267
 — v. Collis, 355
 — v. Cooper (L. R. 6 Ch. 15;
 7 H. L. 53), 88, 89, 90, 91
 — v. Cooper (29 R. 229), 469
 — v. Cooper (6 Ir. Ch. 217),
 501
 — v. Cooper (1 K. & J. 658),
 534
 — v. Cooper (8 Ch. 813), 628,
 629
 — Crause v., 546
 — v. Day, 125
 — v. Denison, 282, 286
 — Doe d. Cock v., 354
 — v. Jarman, 218
 — v. Kynock, 361
 — v. Laroche, 477
 — v. Macdonald (16 Eq. 253),
 472, 473, 553, 596, 633,
 634
 — v. Macdonald (7 Ch. D. 288),
 511, 514
 — v. Mantell, 406
 — v. Martin, 76
 — Moss v., 64, 65
 — v. Pitcher, 608
 — Playfair v., 417
 — v. Slight, 368, 387
 — Streatfield v., 176
 — v. Thornton, 405
 — v. Wells, 512
 — v. Woolfit, 166
 — v. Wyatt, 507
 — Dean v. Stevens, 298, 475
 Coore, Blagrove v., 130, 231
 — v. Todd, 661
 Coote v. Boyd, 124
 — v. Coote, 678
 — v. Gordon, 88
 — v. Lowndes, 140
 — v. O'Reilly, 434
 Cope's Trusts, *In re* (36 L. T. 437),
 665
 Cope, *In bonis*, 30
 — *In re* (16 Ch. D. 49), 377
 — v. Earl de la Warr, 588
 — v. Henshaw, 225
 — Johnson v., 252
 — v. Wilmot, 405, 623
 Copestake, Doe d. Toone v., 303
 Copland, Mann v., 118
 Copley v. Copley, 626
 Coponius, Curius v., 527
 Copous, Cormack v., 473
 Coppard, *In re*; Howlett v. Hodson,
 258
 Coppin v. Coppin, 640
 — Dillon v., 10
 — v. Fernyhough, 131, 436
 Coram, White v., 338

- Corballis v. Corballis, 103, 121, 676
 Corbally, Boyce v., 502
 Corbet v. Corbet, 401, 656
 — Williams v., 86
 Corbett's Trusts, *Re*, 552
 Corbett v. Corbett, 503, 504
 — Webber v., 224
 Corby, *In bonis*, 52
 — Thompson v., 301
 Corbyn v. French, 313, 317, 641
 Corcoran, *Re*; Corcoran v. Riddell, 313
 Cordall's Case, 362
 Cordell v. Noden, 117
 Cordwainers, A.-G. v., 309
 Cordwell's Estate, *In re*; White v. Cordwell, 133
 Corlass, *In re*, 259
 Cormack v. Copous, 473
 Cormick, Welply v., 397
 Cornaby v. Gibbons, 32
 Corneck v. Wadman, 556
 Cornford v. Elliott, 313, 314
 Cornforth, Boon v., 190
 Cornick v. Pearce, 209, 364
 Cornwallis, *In re*; Cornwallis v. Wykeham-Martin, 506, 594
 Corporation of London v. Riggs, 173
 Corr v. Corr, 463
 Corrie's Will, 268, 269
 Corser v. Cartwright, 374
 Cort v. Winder, 563
 Corthorn, Ogle v., 326, 328
 Cosby v. Lord Ashdown, 92
 — Bacon v., 88, 574
 Cosgrave, Kane v., 310
 Cosser, *In bonis*, 52
 Cosserat, Sharp v., 510
 Costabadie v. Costabadie, 403
 Cotter, Commissioners of Charitable Donations v., 563
 Cotton's Trustees, *In re*, 370
 Cotton, *In bonis*, 26
 — *In re*, 149, 385
 — *In re*; Wood v. Cotton, 206, 208
 — Ansley v., 156
 — v. Cotton (2 B. 67), 289, 290
 — v. Cotton (23 L. J., Ch. 489), 531
 — Garth v., 423, 427
 — v. Scarancke, 265
 — Wood v., 206, 208
 Cottrell, Brown v., 238
 — v. Cottrell (2 P. & D. 397), 41
 — v. Cottrell (28 Ch. D. 628), 449
 Coulman, *In re*; Munby v. Ross, 486
 Coulson v. Capper, 505, 508
 Coulthard, *In bonis*, 43
 Coulthurst v. Carter, 543
 — Stanley v., 602
 — Tomkins v., 659
 Coulton, Booth v. (5 Ch. 684), 418
 — Booth v. (7 Jur. N. S. 207), 445
 Counden v. Clarke, 273, 277
 Court v. Buckland, 212
 Courtauld's Estate, *In re*; Courtauld v. Cawston, 195
 Courtenay v. Callaghan, 414
 — v. Williams, 133
 Courthope, Gardiner v., 43, 62, 67
 Courtier, *In re*; Coles v. Courtier, 431
 Courtoy v. Vincent, 156
 Cousins, *In re*; Alexander v. Cross, 174
 Coussmaker, Kidney v. (12 Ves. 136), 91
 — Kidney v. (1 Ves. Jun. 436), 211
 Cout's Estate, *In re*, 174
 Coutts v. Ackworth, 88
 — Monroe v., 54
 Coventry, Lord Chichester v., 627, 628
 — v. Coventry, 256, 493, 665, 675
 — Earl of, Hay v., 578
 — v. Higgins, 152
 — Earl of, Sheffield v., 524
 — Earl of, Tollemache v., 485, 592
 — Waring v., 434, 479
 — v. Williams, 12
 Cowan, Bush v., 199
 — Laing v., 199, 201
 Coward, *In bonis*, 18
 — *Re*; Coward v. Larkman, 172, 394
 — Lyon v., 334
 Cowcher, Reay v., 54
 Cowdery, Smith v., 501
 Cowley, *Re*; Souch v. Cowley, 450
 — Chadock v., 585
 — v. Harstonge, 211
 — Ryan v., 352
 — Souch v., 450
 — Earl, v. Wellesley, 426, 429, 440
 Cowling v. Cowling, 159
 Cowman v. Harrison, 399
 Cowper v. Mantell, 127, 129, 641
 Cowx v. Foster, 205, 206
 Cox's Trusts, *In re*, 145
 Cox, *In re*; Cox v. Davie, 318, 320
 — v. Bennett, 131, 517
 — Besant v., 532
 — Carbery v., 305
 — v. Davie, 318, 320
 — Ellick v., 283
 — v. Fonblanque, 510
 — v. Godsalve, 166
 — Hale v., 679
 — v. Parker, 650
 — v. Sutton, 593
 — Wood v., 402
 Coxe v. Bassett, 55

- Coxe v. Day, 380
 Coxen v. Rowland, 201, 202
 Coyne v. Coyne, 216, 217
 — v. Duigan, 648
 Coyte, *In re*; Coyte v. Coyte, 61, 635
 Cozens v. Crout, 100
 Crabb, Dancer v., 37, 38
 — Goldney v., 393
 Crabtree, Smith v., 620, 635
 Cradock v. Cradock, 325
 — Holmes v., 456
 — v. Owen, 650, 652
 Crafton v. Frith, 307
 Cragg, Marchant v., 230
 Craig v. Midgley, 564
 — Scottish Widows Fund v., 409
 — v. Wheeler, 445
 Craigie v. Lewin, 3, 6, 7
 Craignish, *In re*; Craignish v. Hewitt, 4, 8
 Cramp v. Playfoot, 307
 Crampton v. Wise, 596
 Cranley v. Dixon, 448, 606
 — v. Hale, 653
 Cranmer's Case, 629, 630
 Cranstoun, Doe d. Dunning v., 107, 171
 Cranswick v. Pearson, 421
 Crauford, Palmer v., 410
 Crause v. Cooper, 546
 Craven, *In re*, 280
 — v. Brady, 497, 500, 507, 509, 647
 Crawford's Trust, 289
 Crawford, *In bonis*, 70
 — *In re*, 290
 — Cooke v., 78
 — v. Forshaw, 367
 — Gelliland v., 432
 — v. Trotter, 328
 Crawford, Winterton v., 552
 Crawhall's Trusts, *In re*, 587
 Crawley, *In re*; Acton v. Crawley, 434
 — v. Crawley, 448, 494
 Crawshaw v. Crawshaw, 195
 Crawshay, *In re*; Crawshay v. Crawshay, 65
 — *In re*; Walker v. Crawshay, 508
 — Allin v., 606
 — v. Crawshay, 65
 — Walker v., 508
 Creagh v. Creagh, 166
 — v. Murphy, 400
 — v. Wilson, 500
 Cream, Bainbridge v., 256
 Creaton v. Creaton, 362
 Creber, Right v., 279, 348
 Creed v. Creed, 118, 659
 — Girdlestone v., 322
 — Say v., 282
 Creery v. Lingwood, 533, 535
 Creeth v. Wilson, 460
 Cregoe, Gully v., 403
 Cresswell, *Re*, 83
 — Caldwell v., 452, 502
 — v. Chealyn, 194, 644, 656
 — v. Cresswell, 100, 122, 319
 — National Provincial Bank of England v., 663, 673
 Creswell, *In re*; Parkin v. Creswell, 457
 Creswick v. Gaskell, 563
 — Reeves v., 437, 438
 Crewe v. Dicken, 365
 — Read, Sewell v., 319
 Crickett v. Dolby, 151
 Crigan v. Baines, 529
 Cringan, *In bonis*, 80
 Cripps v. Woolcott, 554, 555
 Crisford, Beales v., 161, 274, 325
 — Crowe v., 446
 Crisp, Doe d. Taylor v., 466
 — v. Walpole, 52
 Crispe, Holmes v., 151
 Crispin, Doglioni v., 4
 — Sharpe v., 5, 7
 Critchett v. Taynton, 247
 Crockett v. Crockett, 403
 Croft, Day v., 126
 — v. Slee, 196
 Crofton, *In re*, 217
 Crofton's Trusts, *In re*, 565
 Crofts, Billson v., 509
 — v. Evetta, 300
 — v. Middleton, 348
 Croker's Estate, *In re*, 589
 Croker v. Brady, 651
 — v. Marquis of Hertford, 62
 Croly v. Croly, 586
 — v. Weld, 416
 Crommelin v. Crommelin, 501
 Crompe v. Barrow, 486, 523
 Crompton v. Jarratt, 170
 — v. Sale, 632
 Crone v. Odell, 260, 262, 617
 — Odell v., 255
 Crook v. Brooking, 64
 — Hill v. (L. R. 6 H. L. 265), 241, 242, 244
 — v. Hill (3 Ch. D. 773), 245, 246
 — Johnson v., 568
 — v. Whitley, 265, 543
 Crookenden v. Fuller, 1
 Croome v. Croome, 401
 Crop, Read v., 92
 Cropton v. Davies, 360, 607
 Crosbie, Evans v., 168
 — v. Macdonal, 43, 59
 — Wagstaff v., 525
 Crosland, *Re*; Craig v. Midgley, 563
 Cross, *Ex parte*; *In re* Duleep Singh, 7
 — Alexander v., 174
 — Bird v., 495

- Cross v. Cross, 11
 — Cunliffe v., 21
 — Gibbens v., 56
 — Henderson v., 505, 519
 — v. Kennington, 672
 — Leadbeater v., 456
 — v. Maltby, 553
 Crossley v. Clare, 27C
 Crossman, Mervin v., 268, 466, 483
 Crosthwaite v. Dean, 570
 — Edmondson v., 441
 Croughton's Trusts, *In re*, 515
 Crout, Cozens v., 100
 Crowder, Bromfield v., 454
 — v. Clowes, 125, 126
 — v. Stone, 550, 560, 563, 584
 Crowdy, Dutton v., 537
 Crowe, Barnes v., 60, 62
 — v. Crisford, 446
 — v. Menton, 127, 216
 Crowhurst, Godden v., 407
 Crowther, Atherton v., 290, 291
 — Marshall v., 446
 Croxon, Morley v., 318
 Crozier v. Crozier (3 D. & War. 373),
 347, 356, 647
 — v. Crozier (15 Eq. 282), 525
 — v. Fisher, 557
 Cruikshank v. Duffin, 376
 Crump d. Woolley v. Norwood,
 350
 — v. Playfoot, 320
 Cruse v. Barley, 212
 Cruttenden, *In re*; Davey v. Lansdell,
 34
 Cruttwell, Bickham v., 136, 678
 — v. Lye, 166
 — Palmer v., 252
 Cruwys v. Colman, 275
 Cubbon, *In bonis*, 68
 Cubitt, Brady v., 55
 — Worts v., 243
 Cuddy, Lucas v., 266
 Cuff v. Hall, 365
 Cullen, Bent v., 413
 — King v., 256, 562
 — Roch v., 122, 125
 Cullimore's Trusts, *In re*, 275
 Cullimore, Jones v., 586
 Culsha v. Cheese, 638
 Culver, Dowsett v., 388, 662
 Cumberland's (Countess of) Case, 426
 Cumberland, Scott v., 659, 663,
 666
 Cumberlege v. Cumberlege-Ware, 289,
 473, 639
 Cumberlege-Ware, Cumberlege v.,
 289, 473, 639
 Cundall, Doe v., 339
 Cundy v. Medley, 54
 Cuninghame, Smith v., 489
 Cunison, Popple v., 53
 Cunliffe v. Branker, 261, 358, 359
 — Cooke v., 206
 — v. Cross, 21
 Cunningham, *Ex parte*; *In re*
 Mitchell, 6
 — v. Butler, 108
 — Foot v., 450
 — v. Ross, 130
 — Smith v., 43
 — Stephen v., 469, 514
 Cuno, *In re*; Mansfield v. Mansfield,
 16, 19
 Cunynghame's Settlement, 477, 487
 Cunynghame, Rose v., 54
 Cupit v. Jackson, 409
 Curius v. Coponius, 527
 Curnick v. Tucker, 403
 Currall, Bowyer v., 549
 Currey, *Re*; Gibson v. Wey, 17
 — v. Brough, 615
 — Byne v., 155
 Currie, *In re*; Bjorkman v. Kim-
 berley (Lord), 156
 — Lake v., 198
 — v. Pye, 124, 313
 Curry, Jones v., 196
 — v. Pile, 122
 Cursham v. Newland, 536
 Curteis v. Kenrick, 197
 — v. Wormald, 215
 Curtis, Bishop v., 75
 — v. Curtis, 24
 — v. Fulbrook, 372
 — v. Graham, 325
 — v. Halton, 320
 — Haverty v., 459
 — v. Lukin, 489
 — v. Price, 347, 361
 — v. Rippon, 400
 Curwen, Stonor v., 252, 598
 Curzon v. Curzon, 589
 — Lord, Perfect v., 471
 — Lord Scarsdale v., 593
 — *Re* Thompson to, 533
 Curzon-Howe, Cardigan v. (30 Ch. D.
 530), 372
 — Cardigan v. (9 Eq. 358), 581
 Cusack v. Jellicoe, 152
 — v. Rood, 286
 Cust v. Middleton, 170
 Custance, Holmes v., 220
 Cutbush v. Cutbush, 383
 Cutfield, Wardroper v., 457
 Cuthbert v. Lemprière, 618
 — v. Robinson, 172
 Cutto v. Gillbert, 42
 Cutts, Hawley v., 110
 DA COSTA v. Keir, 534
 Dacre, Cavendish v., 87, 90, 91
 — Doe v., 523
 — v. Patrickson, 138, 652, 675
 Dade, Casson v., 29
 Dadds, *In bonis*, 44
 D'Aglié v. Fryer, 446

- Daines *v.* Eaton, 447
 — *King's Proctor v.*, 11
 Daintree and Butcher *v.* Fasulo, 28
 Daintree, Mellor *v.*, 622
 Daintry *v.* Daintry, 603
 Dakyns, Slark *v.*, 485, 486
 Dalby *v.* Pullen, 75
 Dale *v.* Hayes, 441
 — *Shepherdson v.*, 334
 Dales, Snowdon *v.*, 407
 Daley *v.* Desbouverie, 502
 Dalhousie (Countess of) *v.* Macdonall,
 4, 5, 6
 Dallas, Davidson *v.*, 255
 — *Hamilton v.* (38 L. T. 215),
 4, 154
 — *Hamilton v.* (1 Ch. D. 257), 7
 — *v.* Towry, 616, 665
 Dallow, *In bonis*, 26, 61, 62, 63
 — *Evans v.*, 45
 D'Almaine *v.* Moseley, 176
 Dalrymple *v.* Hall, 231, 569
 — *Lord Woodhouselee v.*, 240
 Dalton *v.* Hill, 470
 Daly's Settlement, *In re*, 5
 Daly, A.-G. *v.*, 144
 — *Aubin v.*, 410
 — *v.* Beckett, 429
 — *Ingham v.*, 661
 Dalzell *v.* Welch, 267
 Damer, Earl of Portarlington *v.*, 661,
 670
 Dancer *v.* Crabb, 37, 38
 Dane's Estate, *In re*, 219
 Dangerfield, Slater *v.*, 344, 356
 Daniel's Settlement Trusts, *In re*,
 621
 Daniel *v.* Daniel, 165
 — *v.* Matthews, 541
 — *v.* Miles, 180
 — *v.* Warren, 446
 Daniell, *In bonis*, 61
 — *v.* Daniell (3 De G. & S. 337),
 250
 — *v.* Daniell (6 Ves. 297), 555
 — *v.* Gossett, 557
 — *Randall v.*, 598
 Danily *v.* Johnson, 647
 — *v.* Platt, 229, 242
 Dansey *v.* Griffiths, 337
 Danvers, Doe d. Cook *v.*, 223
 Da Pontes, Ford *v.*, 46
 Darbison d. Long *v.* Beaumont, 276
 Darbon *v.* Rickards, 417, 418
 Darby, Harbin *v.*, 389
 — *Purser v.*, 186
 Dare *v.* Hopkins, 427
 Darell, Hales *v.*, 630
 Darley *v.* Darley, 513
 — *v.* King, 610
 — *v.* Langworthy, 452, 616
 Darlow *v.* Edwards, 228
 Darrel *v.* Molesworth, 528
 Dartmouth, Lord, Howe *v.*, 443
 Dash, *Re*; *Darley v.* King, 510
 Dashwood *v.* Magniac, 426
 — *v.* Peyton, 89
 Da Silva, *In bonis*, 58, 67
 Daunt, Gillman *v.*, 257
 Davenhill *v.* Fletcher, 118
 Davenport's Trusts, *Re*, 228, 238, 241
 Davenport, *In re*; *Turner v.* King, 396
 — *v.* Bishopp, 535
 — *v.* Coltman, 168, 214
 — *v.* Davenport, 601
 — *Elliott v.*, 638, 639
 — *v.* Hanbury, 267
 — *Holdsworth v.*, 315
 — *Stow v.*, 156
 Daveron, *In re*; *Bowen v.* Churchill,
 480
 — *Day v.*, 168
 Davers *v.* Dewes, 193, 653
 Davey *v.* Lansdell, 34
 — *v.* Ward, 385
 David, *In re*; *Buckley v.* Royal
 National Lifeboat Institution,
 316
 David's Trusts, *In re*, 76, 206, 396
 Davidson *v.* Dallas, 255
 — *Emley v.* (30 W. R. 257), 10
 — *Emley v.* (19 Ch. D. 156), 314,
 319
 — *v.* Kimpton, 558
 Davie, Cox *v.*, 318, 320
 — *v.* Stevens, 345
 Davies's Trusts, *In re* (13 Eq. 163),
 199, 201
 Davies's Will, *Re* (29 B. 93), 249
 Davies, *In bonis*, 27
 — *Ex parte*, 337, 583
 — *In re*; *Davies v.* Davies, 198
 — *v.* Ashford, 118
 — A.-G. *v.*, 317, 320
 — *v.* Bush, 660
 — *Cropton v.*, 360, 607
 — *v.* Davies (1 Ca. t. Lee, 444),
 45
 — *v.* Davies ([1892] 3 Ch. 63),
 198
 — *v.* Davies (30 W. R. 918), 527,
 532
 — *v.* Earl of Dysart, 440
 — *Evans v.*, 243
 — *v.* Eyton, 431
 — *v.* Fisher, 207, 466, 467
 — *v.* Fowler, 115
 — *v.* Goodhew, 210
 — *Gough v.*, 99
 — *v.* Hetherington, 621
 — *Hole v.*, 524
 — *v.* Huguenin, 236, 237, 457
 — *Jones v.*, 525
 — *to Jones & Evans*, 357
 — *La Roche v.*, 540
 — *v.* Leo, 427, 428
 — *Lloyd v.*, 534
 — *Lowe v.*, 352
 — *v.* Merceron, 581
 — *v.* Morgan, 116

- Davies, Parrott v., 465
 — Powell v., 231
 — Richards v., 574
 — v. Thorns, 206
 — v. Topp, 657
 — Warren v., 672
 — v. Wattier, 416
 — Wheateley v., 155
 — Wildes v., 168, 298, 492, 494
 — Young v., 643
 Davis's Trusts, *Re*, 310
 Davis, *In bonis*, 26, 29
 — *Ex parte*, 434
 — v. Angel, 501
 — Bateman v., 379
 — v. Bennett (4 D. F. & J. 327), 252
 — Bennett v. (2 P. W. 316), 512
 — v. Davis, 139
 — Entwistle v., 313, 314
 — v. Gibbs, 182
 — Godfrey v., 238, 241, 256
 — Gover v., 187
 — Gully v., 176, 182
 — v. Harford, 380
 — Harris v., 194, 337, 343, 519, 577
 — v. Kirk, 276
 — Knight v., 134
 — Lloyd Phillips v., 476
 — v. Norton, 524
 — Smith v., 189
 — Williams v., 289
 Davison, *Re*; Greenwell v. Davison, 176, 183
 — and Torrens, *Re*, 174
 — Gorbell v., 282, 286
 — Greenwell v., 177, 183
 Davy, *In bonis*, 23
 — v. Burnsall, 326, 344
 — Champney v., 192, 307, 319, 323
 — v. Smith, 29
 Dawes, *Ex parte*; *In re* Moon, 507, 508
 — Trusts, *In re*, 541, 555
 — v. Bennett, 618
 — Bland v., 512, 513
 — Boddy v., 153
 — De Rochefort v., 143
 — v. Scott, 675
 Dawkins v. Lord Penrhyn, 506
 Dawson, *In re*; Johnston v. Hill, 477
 — Birch v., 164
 — v. Bourne, 326
 — v. Clarke, 401, 652
 — Cook v., 672
 — v. Dawson, 634
 — Dixon v., 213
 — v. Hearn, 411
 — James v., 575
 — v. Oliver Massey, 496, 502
 Dawson v. Small (18 Eq. 114), 304, 308
 — v. Small (9 Ch. 651), 577
 — v. Thorne, 654
 Day v. Barnard, 285
 — Clerke v., 353
 — Cooper v., 125
 — Cox v., 380
 — v. Croft, 125
 — v. Dameron, 163
 — v. Day (1 Dr. & Sm. 261), 135
 — v. Day (14 W. R. 261), 139
 — v. Day (I. R. 4 Eq. 385), 288
 — v. Day (1 Dr. 569), 411
 — v. Day (Kay, 703), 420, 572
 — v. Radcliffe, 565
 — Right v., 337, 583
 — v. Trig, 171
 Dayman v. Dayman, 69
 Deakin, *In re*; Starkey v. Eyres, 271
 Dealey, Cooke v., 219
 Dean, *In re*; Cooper-Dean v. Stevens, 298, 475
 — Booth v., 228
 — Crosthwaite v., 570
 — v. Dean, 261, 521
 — v. Gibson, 137
 — v. Handley, 533
 — James v., 131
 Deane v. Test, 114
 Dear, *In re*; Helby v. Dear, 256, 458
 Dearle, *In bonis*, 26, 62
 Dearsley, Elliott v., 139, 141, 673, 677
 Death, Fenn v., 247
 De Beaucherc, Hodgson v., 7
 De Beauvoir v. De Beauvoir, 279, 280
 De Beauvoisin, Webb v., 656, 665
 Debenham, Lane v., 365
 — Morris v., 370
 Debeze v. Mann, 634
 Debney v. Eckett, 431
 De Bode, *In bonis*, 38
 De Bonneval v. De Bonneval, 6, 7
 — De Themmines v., 506
 De Burgh Lawson, *In re*; De Burgh Lawson v. De Burgh Lawson, 96, 672
 De Clifford, Commissioners of Donations v., 478
 Deery v. Mazarine, 18
 Deey, Commissioners of Charitable Donations v., 274
 De Falbe, Blundell v., 569
 Deffis v. Goldschmidt, 258
 Defries, Isaac v., 302
 De Garagnol v. Liardet, 553
 De Geer v. Stone, 19, 99
 De Gendre v. Kent, 144

- Deighton's Settled Estates, *In re*, 469
 Delacherois v. Delacherois, 169
 De La Hunt and Pennington's Contract, *Re*, 338
 De la Mare, Rackham v., 528
 Delamere, Owen v., 382
 Delaney, A.-G. v., 301
 Delany's Estate, *In re*, 297
 Delany v. Delany, 167
 De la Rue, *In bonis*, 70
 De la Saussaye, *In bonis*, 2, 42, 43
 De la Warr (Earl), Cope v., 588
 De Lisle v. Hodges, 121
 De Livera, Dias v., 13, 231, 264
 Dell v. Pigott, 103
 Delmare v. Robello, 220
 De Lusi's Trusts, *In re*, 201, 202
 Delves v. Newington, 660
 De Manneville v. De Manneville, 97
 De Mazay v. Pybus, 655
 Dempsey v. Lawson, 41
 Denby, *Re*, 293
 Dench v. Dench, 32
 Dendy, Heath v., 660
 Deneker, *In re*; Peters v. Banchereau, 83
 Dening, Baker v., 24
 — Sotheran v., 42
 Denis's Trusts, *In re*, 268
 Denison, Cooper v., 282, 286
 — King v., 401, 645, 653
 Denn v. Gaskin, 338
 — v. Gillott, 342
 — v. Roake, 195
 — Roake v., 195
 — v. Slater, 387
 — d. Breddon v. Page, 578
 — d. Gearing v. Shenton, 342
 — d. Mellor, Moor v., 339
 — d. Webb v. Puckley, 355
 — d. Wilkins v. Kemeys, 572
 Denne, Walker v., 210, 650
 Denneby's Estate, *In re*, 489
 Dennis, *In bonis*, 59
 Dennison, Hardcastle v., 341
 Denny's Estate, *In re*, 578
 Denny v. Barton, 11
 Dent v. Allcroft, 318, 319
 — v. Dent, 432
 — Ker v., 315
 — Wilkinson v., 88, 93
 Denton, *Re*; Bannerman v. Toosey, 538
 — v. Lord J. Manners, 320
 — Salusbury v., 271, 307, 319
 — Stewart v., 116, 134
 — Wedgwood v., 131, 495
 Denysen v. Mostert, 13
 De Pontes, Ford v., 614
 Derby's Case, Lord, 522
 Derby, Wallop v., 618
 Dering, Monypenny v., 476, 482, 487, 488, 523, 589, 608
 De Rochefort v. Dawes, 143
 De Roebuck v. Cloncurry (Lord), 158
 De Rosaz, *In bonis*, 222
 Desbarats, Chaudière Mining Co. v., 98
 Desbody v. Boyville, 536
 Desbouverie, Daley v., 502
 De Serre v. Clarke, 474
 Desings v. Beare, 166
 Despard, Lamphier v., 189
 De Tastet v. Le Tavernier, 509
 D'Etchegoyen v. D'Etchegoyen, 8
 De Teissier, *In re*; De Teissier v. De Teissier, 381
 De Themmines v. De Bonneval, 506
 De Trafford v. Tempest, 192, 193
 Devall v. Dickens, 390, 396
 Devaynes, Land v., 130
 — Reed v., 292
 Devereux v. Bullock, 54
 — Christian v., 294
 Devez v. Pontet, 630
 De Villiers Denysen, Heirs Hidingh v., 377
 Devisme v. Mellish, 271
 De Vitre, Jeffery v., 326, 327
 Devitt v. Kearney, 166, 377, 382
 Devon, Ward v., 372
 — Duke of, Metham v., 242, 244, 245
 Devonshire, Duke of, Barker v., 672
 Dew v. Clark, 14
 — Dowell v., 435
 Dewar v. Brooke, 461
 — v. Maitland, 1
 Dewell, Howarth v., 395
 Dewes, Davers v., 193, 65
 — Hall v., 368
 Dewhurst, Price v., 8
 De Windt v. De Windt, 325
 De Witte v. De Witte, 327
 D'Eyncourt, Bostock v., 334
 — v. Gregory (3 Eq. 382), 431
 — v. Gregory (1 Ch. D. 441), 503
 — v. Gregory (34 B. 36), 590, 647
 De Zichy Ferraris v. Lord Hertford, 3
 D'Hedouville, Hope v., 443
 D'Huart v. Harkness, 2
 Dias v. De Livera, 13, 231, 264
 Dibbin, Churchill v., 197
 Dicconson v. Talbot, 436
 Dick v. Lacy, 253, 393
 — v. Lambert, 653
 Dicken v. Clarke, 456
 — Crewe v., 365
 — v. Edwards, 679
 Dickens, Devall v., 390, 396
 Dickenson, Harman v., 551
 Dickin v. Edwards, 118
 Dickinson v. Dickinson 415
 — v. Ord, 106

- Dickinson v. Stidolph, 41, 47
 — v. Swatman, 38
 Dickson's Trust, 497
 Dickson, *In bonis*, 69
 — *In re*; Hill v. Grant, 149, 385
 — v. Robinson, 94
 — Russell v., 123
 Diggles, *In re*; Gregory v. Edmondson, 398, 401
 Dighton, Tomlinson v., 76
 Dilkes, *In bonis*, 30
 Dilley v. Matthews, 243
 Dillon v. Arkins, 164
 — Boswell v., 597
 — v. Coppin, 10
 — v. Dillon, 434
 — v. Harris, 571
 — v. M'Donnell, 158
 — Macnamara v., 348
 — v. Reilly (I. R. 10 Eq. 152), 299, 301
 — v. Reilly (9 L. R. Ir. 57), 567
 Dimes v. Scott, 447
 Dimmock, *Re*; Dimmock v. Dimmock, 382
 Dimond v. Bostock, 643
 Dingle v. Dingle, 54
 Dingwell v. Askew, 17, 128
 Dinmore, *In bonis*, 27
 Disney, Carpenter v., 87
 Dix v. Reed, 293
 Dixon's Trusts, *In re* (I. R. 4 Eq. 1), 268
 Dixon, *In bonis*, 280
 — *In re* ([1892] P. 386), 79
 — *In re* (2 Jur. N. S. 970), 240
 — *In re*; Byram v. Tull, 230
 — Aitcheson v., 8
 — Arnold v., 219
 — Baines v., 674
 — v. Barkshire, 471
 — v. Barlow, 322
 — Clark v., 44
 — Cranley v., 448, 606
 — v. Dawson, 213
 — v. Dixon, 289, 290
 — Moore v., 666
 — v. Peacock, 432, 433
 — Randell v., 476
 — Roadley v., 94
 — v. Rowe, 508
 Dixwell, Roberts v., 511
 Doane, *In re*, 120
 Dobson, *In bonis*, 12
 — v. Banks, 194
 — v. Bowness, 175, 176
 — Sanderson v., 175
 — v. Waterman, 110
 Dod v. Dod, 601
 Dodd, Maguire v., 10
 Dodds v. Dodds, 351, 355
 — Pedley v., 103
 Dodgson's Trust, 565, 567
 Dodgson, Ives v., 613
 Dodsley, Stocks v., 292, 390
 Dodson v. Grew, 355
 Doe v. Allen, 338
 — v. Barford, 55
 — v. Barthrop, 360, 361
 — v. Biggs, 358
 — v. Bower, 103
 — v. Brazier, 605
 — v. Chichester, 89
 — v. Claridge, 362
 — v. Clarke, 259
 — v. Clayton, 338
 — v. Collins, 171
 — v. Cundall, 339
 — v. Dacre, 523
 — v. Dring, 177
 — v. Edlin, 55
 — v. Freeman, 458
 — v. Frost, 337
 — Girdlestone v., 541
 — v. Hallett, 247
 — v. Harris, 44
 — v. Heneage, 590
 — v. Hicks, 598
 — v. Homfray, 358
 — v. Hopkinson, 456
 — v. Hughes, 374
 — v. Laming, 350
 — v. Lancashire, 55
 — v. Lawson, 286, 287, 288
 — v. Luxton, 74
 — v. Manifold, 29
 — v. Palmer, 32, 33
 — v. Parratt, 334
 — v. Perkes, 44
 — v. Plumptre, 284
 — v. Rucastle, 355
 — v. Shotton, 365
 — v. Simpson, 362
 — v. Sotheman, 330
 — v. Thorley, 76
 — v. Tomkinson, 75
 — v. Vardill, 239
 — v. Wainwright, 550
 — v. Webber, 574
 — v. Woodhouse, 357
 Doe d. Allen v. Allen, 223
 — Angell v. Angell, 277
 — Ashby v. Baines, 338, 672
 — Atkinson v. Fawcett, 338
 — Atkinson v. Featherstone, 350
 — Baldwin v. Rawding, 569, 571
 — Beach v. Earl of Jersey, 102, 108
 — Bean v. Halley, 603
 — Belasye v. Earl of Lucan, 170
 — Blakiston v. Haslewood, 248
 — Blandford v. Applin, 354
 — Blesard v. Simpson, 341, 574
 — Blomfield v. Eyre, 525
 — Borwell v. Abey, 421
 — Bosnall v. Harvey, 350

TABLE OF CASES.

li

- Doe d. Bromley v. Bettison, 435
 — Browne v. Greening, 102
 — Burden v. Burville, 610
 — Burdett v. Wrighte, 324, 339
 — Burkitt v. Chapman, 175
 — Burrin v. Chorlton, 345
 — Cadogan v. Ewart, 359
 — Candler v. Smith, 350
 — Cannon v. Rucastle, 340
 — Chattaway v. Smith, 273
 — Chevalier v. Huthwaite, 226
 — Chichester v. Oxenden, 102
 — Chidgey v. Harris, 324
 — Earl Cholmondeley v. Weatherby, 180
 — Clarke v. Ludlam, 181
 — Clift v. Birkhead, 537
 — Cock v. Cooper, 354
 — Comberbach v. Perryn, 577
 — Compere v. Hicks, 361
 — Conolly v. Vernon, 103
 — Cook v. Danvers, 223
 — Cooper v. Collis, 355
 — Cross v. Cross, 11
 — Davy v. Burnsall, 326, 344
 — Dell v. Pigott, 103
 — Dunning v. Cranstoun, 107, 171
 — Elton v. Stenlake, 349, 488
 — Evans v. Evans, 617
 — Everett v. Cooke, 570, 571
 — Evers v. Challis, 522, 523
 — Fox, Marston v., 35
 — Gains v. Rouse, 223
 — Gallini v. Gallini, 603
 — Garrod v. Garrod, 345
 — Gigg v. Bradley, 345
 — Gill v. Pearson, 504
 — Gillard v. Gillard, 357
 — Gilman v. Elvey, 326, 344
 — Gord v. Needs, 223, 224
 — Gore v. Langton, 172
 — Gorges v. Webb, 610
 — Guest v. Bennett, 163
 — Harris v. Greathed, 103
 — Harris v. Taylor, 378
 — Haw v. Earles, 177
 — Herbert v. Thomas, 395
 — Hickman v. Haslewood, 178
 — Hiscocks v. Hiscocks, 223, 225
 — Hunt v. Moore, 454
 — Hurrell v. Hurrell, 176
 — Jearrod v. Banister, 336
 — Jeff v. Robinson, 347
 — Johnson v. Johnson, 583
 — Keen v. Walbank, 361
 — Kenrick v. Lord Beauchlerk, 496
 — Kimber v. Cafe, 361
 — King v. Frost, 583, 584
 — Knott v. Lawton, 340
 — Lees v. Ford, 524
 — Lemprière v. Martin, 172
 — Lifford v. Sparrow, 534, 557
 — Lindsey v. Colyear, 279
 Doe d. Littledale v. Smeddle, 337
 — Littlewood v. Green, 329
 — Lumley v. Earl of Scarborough, 589, 591
 — Lyde v. Lyde, 580
 — Moreton v. Fossick, 179, 180
 — Morgan v. Morgan, 222, 223, 224
 — Nethercote v. Bartle, 180
 — Newton v. Taylor, 103
 — Noble v. Bolton, 353, 360
 — Parkin v. Parkin, 103, 108
 — Patrick v. Royle, 253
 — Pell v. Jeyes, 180
 — Phillips v. Aldridge, 303
 — Phipps v. Lord Mulgrave, 577
 — Planner v. Scudamore, 455
 — Player v. Nicholls, 360
 — Pottow v. Fricker, 338
 — Pratt v. Pratt, 178
 — Reade v. Reade, 186
 — Remow v. Ashley, 109
 — Rew v. Lucraft, 580
 — Roake v. Newell, 454
 — Roylance v. Lightfoot, 185
 — Sams v. Garlick, 339
 — Scott v. Roach, 520
 — Shalcross v. Palmer, 47
 — Shelley v. Edlin, 360
 — Simpson v. Simpson, 574
 — Smith v. Webber, 583, 584
 — Snape v. Neville, 618
 — Spearing v. Buckner, 176
 — Strong v. Goff, 342
 — Taylor v. Crisp, 496
 — Templeton v. Martin, 101
 — Thomas v. Beynon, 221, 225
 — Thorne v. Phillips, 339
 — Todd v. Tisbury, 579
 — Tomkyns v. Willan, 361
 — Toone v. Copestake, 303
 — Tyrrell v. Lyford, 103
 — Usher v. Jessep, 570
 — Walls v. Langlands, 175
 — Watson v. Shippard, 524
 — Wells v. Scott, 179
 — Westlake v. Westlake, 224
 — White v. Simpson, 362
 — Williams v. Evans, 62
 — Willis v. Martin, 473
 — Winter v. Perratt (3 M. & Sc. 594), 278
 — Winter v. Perratt (9 Cl. & F. 606), 478
 — Woodall v. Woodall, 353
 — York v. Walker, 106, 107
 Dogget, Pawlet v., 583
 Doglioni v. Crispin, 4
 Doherty v. Dwyer, 32, 34
 Doidge, Duke v., 237
 Dolan v. Macdermot, 295
 Dolby, Crickett v., 151
 Dolman, Adolph v., 669
 — Pearson v., 412, 464, 465, 466
 505

- Dolman, Soar v., 38
 — Young v., 665
 Dolphin, Graves v., 422
 — v. Robins, 5
 Dommett v. Bedford, 422
 Domville v. Baker, 130
 — v. Taylor, 164
 — v. Winnington, 234, 235
 Donaldson, *In bonis* (3 P. & D. 45), 2
 — *In bonis* (2 Curt. 386), 47
 Doncaster, Roper v., 664
 Donegan, Murphy v., 287
 Donnelly, Murphy v., 173
 Donmall, Best v., 145
 Donn v. Penny, 393
 Donnellan v. O'Neill, 126, 303
 Donnelly v. Broughton, 22
 Donnery, Healy v., 610
 Donoghue v. Brooke, 268
 Donohoe v. Mooney, 525
 Donovan, Mahony v., 187, 190
 — v. Needham, 152
 Doo v. Brabant, 528
 Doody v. Higgins, 280, 281
 Dooley v. Mahon, 222
 Door v. Geary, 110
 Dor, Pyne v., 424
 Doran, Bunbury v., 340
 — v. Wiltshire, 374, 424
 Dorchester, Lord, v. Earl of Effingham, 599
 Doré v. Fletcher, 461
 Dorian (Bp.), Robb v., 303
 Dorin v. Dorin, 241
 Dormay v. Borradaile, 669, 672
 Dormer, Lord Beaucherk v., 586
 — v. Parkhurst, 451
 — v. Phillips, 277
 — Sheldon v., 674
 — Williams v., 5
 Dorrian v. Gilmore, 301
 Dorril, Routledge v., 489
 Dorset, Duke of, Woodcock v., 472
 Dorsett v. Dorsett, 510
 — Hunt v., 252
 Dost Aly Khan, *In bonis*, 70
 Dotterill, Gosden v., 156, 158
 Douce, *In bonis*, 24
 — v. Lady Torrington, 671
 Doucet v. Geoghegan, 8
 Doughty, Betts v., 22, 72
 — v. Bull, 210
 Douglas, *In re*; Obert v. Barrow, 298, 307
 — Alexander v., 275
 — v. Andrews, 537
 — v. Chalmer, 530
 — v. Congreve, 349
 — v. Douglas, 4, 5
 — v. Fellows, 222
 — Earl of Hardwicke v., 618
 — Munroe v., 6, 9
 — v. Smith, 53
 — v. Willes (7 Ha. 318), 628
 — v. Willes (10 B. 47), 253
 Douglass, Bowyer v., 549
 — O'Leary v., 41
 Doutty v. Laver, 524
 Dove, Bridgman v., 669, 676
 Dover v. Alexander, 239
 — Jackson v., 469, 470
 Dowdall v. M'Cartan, 139
 Dowding v. Smith, 251
 Dowell v. Dew, 435
 Dowglass v. Waddell, 191, 470, 487
 Dowling's Trusts, 535
 Dowling, Baines v., 430
 — v. Dowling, 608, 609
 — Fream v., 679
 — Gauly v., 163
 — v. Hudson, 672
 Down v. Down, 108
 — v. Worrall, 306
 Downe, Viscount, v. Morris, 649
 Downes, Bullock v., 282, 285, 288
 Downing's Residuary Estate, *Re*, 66
 Downing, Bagnall v., 11
 — Grimson v., 350
 — Parker v., 95
 Downse, *In re*; Downse v. Glass, 630
 — v. Gorton, 377, 384
 Dowsett v. Sweet, 221, 223
 Dowsett v. Culver, 388, 662
 Dowson v. Bell, 95
 — v. Gaskoin, 159
 — Stephenson v., 116, 161
 Doyle, Collins v., 161
 — Murphy v., 162, 379
 Doyley v. A.-G., 307
 — A.-G. v., 278
 Drake v. Drake, 225
 — Eales v., 117, 636, 639
 — v. Kershaw, 138
 — v. Martin, 137
 — v. Trefusis, 380
 Drakeford v. Drakeford, 555, 645
 Drakeley's Estate, 146, 421
 Drant v. Vause, 217
 Draper, *In re*, 411
 Drapers, A.-G. v., 308
 Drax, *Re*; Savile v. Yeatman, 228
 Draycott v. Wood, 422, 461
 Drennan v. Andrew, 526
 Dresser v. Gray, 112, 113
 Devon v. Devon, 6
 Drew v. Barry, 410
 — Hanan v., 580
 — Walter v., 533, 603
 — Wood v., 478
 Drewett v. Pollard, 492
 Drewitt, Mills v., 416
 Dring, Doe v., 177
 Drinkwater v. Falconer, 114, 129
 — Martin v., 124
 Driver v. Driver, 622
 — v. Frank, 232
 — v. Thompson, 16
 — White v., 15
 Drosier, Case v., 479
 Druitt v. Seaward, 288

- Drummond, *In bonis*, 61, 68
 — and Davis's Contract, *In re*, 511
 — v. Leigh, 243
 — v. Parish, 51
 — President of United States v., 5, 295
 — Tatham v. (2 H. & M. 262), 149
 — Tatham v. (4 D. J. & S. 484), 287
 Dryland, Howard v., 677
 Drysdale, Nevin v., 633
 Duane, *In bonis*, 21, 23
 Dubber d. Trollope v. Trollope, 353
 Ducan, Wilkinson v., 448
 Ducane, Howard v., 436
 Duckett v. Thompson, 600
 Duckmanton v. Duckmanton, 109
 Duckworth, Aspinall v., 292, 641, 643, 645
 — Spencer v., 567
 Duddy v. Gresham, 451, 499, 500, 502
 Dudin, Whittell v., 397
 Dudley v. Champion, 106, 107
 — Lord, v. Lord Warde, 431
 Duff, Gordon v., 115
 Duffey, Leader v., 473, 564
 Duffield, Cogan v., 600
 — v. Duffield, 145, 453, 455
 Duffin, Cruikshank v., 376
 Duffy, *In bonis*, 32
 — Kelly v., 180
 Dufour v. Pereira, 13
 Dugard, Manfield v., 416, 454
 Dugdale, *In re*; Dugdale v. Dugdale, 503, 504, 505
 — v. Dugdale (11 B. 402), 251
 — v. Dugdale (14 Eq. 234), 659, 667
 — v. Dugdale (38 Ch. D. 176), 503, 504, 505
 Duggan v. Kelly, 499, 536
 — Mahony v., 296
 Duggins, *Re*, 30
 Duguid v. Fraser, 615, 644
 — Wilson v., 263, 333
 Du Hourmelin v. Sheddou, 99
 Duigan, Coyne v., 648
 Duke, *In re*; Hannah v. Duke, 554
 — v. Doidge, 237
 — Hannah v., 554
 Duleep Singh, *In re*; *Ex parte* Cross, 7
 Dumble, *In re*; Williams v. Murrell, 147
 Dummer, Chamberlayne v., 425
 — v. Pitcher, 75, 92
 Dunbar, Borton v., 190
 — Ferguson v., 554
 Duncan v. Bluett, 598
 — v. Duncan, 125
 — v. Lawson, 1
 — Lawson v., 664
 Duncan, Parker v., 22
 — v. Watts, 660
 — Wilkinson v., 443, 483, 486
 Dundas, Pass v., 389
 — v. Wolfe-Murray, 153
 Dundee, Magistrates of, v. Morris, 307, 623
 Dungannon, Lord, Ker v., 485
 — Lord, v. Smith, 477, 482, 484
 Dunk v. Fenner, 350, 676
 Dunlevy's Trusts, *In re*, 552
 Dunlop, *In re*; Dunlop v. Dunlop, 143
 — Locke v., 237, 247
 — Moss v., 286
 Dunn, A.-G. v., 6
 — v. Bownas, 318
 — v. Flood, 475
 — Gainsford v., 205, 673
 — Green v., 193
 Dunnage v. White, 175
 Dunne v. Dunne, 432, 503
 Dunnett, Rowbotham v., 65, 66
 Dunnill's Will, *Re*, 602
 Dunning v. Cranstoun, 107, 171
 Dunster, Stedman v., 497
 Du Pasquier, Harris v., 607
 Durance *In bonis*, 44, 67
 Durand, Hart v., 240
 Durdant Burchett v., 276
 Durham v. Northen, 61
 — Bishop of, Morice v., 298, 306
 — Lord, v. Wharton, 633
 Durour v. Motteux, 212
 Durrant v. Friend, 123, 238
 Durston, Grosvenor v., 75, 92, 159
 Durgate, Robinson v., 395
 Dutton, *In bonis*, 43
 — *Re*, 297, 477
 — Boots v., 615
 — v. Brookfield, 376
 — v. Crowdy, 537
 — v. Hockenhull, 190
 — Strother v., 463, 547
 Dwarries, Shewell v., 513
 Dwyer, Anderson v., 155
 — Doherty v., 32, 84
 Dye v. Dye, 17
 Dyer, Bragg v., 52
 — Grant v., 496, 513
 — Miles v., 573
 Dyke, *In bonis*; *In bonis* Stedham, 59
 — *Re*; Dyke v. Dyke, 405
 Dyose v. Dyose, 662
 Dyott, Wakefield v., 559
 Dysart, Earl of, Davies v., 440
 — Earl of, Pennell v., 440
 EADE v. Eade, 399, 400
 Eager v. Furnival, 642
 — McKenna v., 356

- Eagles v. Le Breton, 271, 272
 Eagleton v. Horner, 242, 289
 — Tapley v., 104, 109, 110
 Eales v. Cardigan, 421
 — v. Drake, 117, 636, 639
 Eames v. Anstee, 594
 — v. Hacon, 3, 80
 — Lambe v., 274, 404
 Earl, *In bonis*, 69, 70
 Earle v. Bellingham, 150, 417, 418
 — Cadett v., 164
 — Tarbottom v., 417
 — v. Wilson, 245
 Earles, Doe d. Haw v., 177
 Earlom v. Saunders, 211
 Early v. Benbow, 122, 155
 — v. Early, 142
 — v. Middleton, 122, 248
 — Roffey v., 118
 — Townsend v., 263
 Earnley, Batten v., 155
 Eason, Elton v., 391
 East v. Cook, 88
 — v. Twyford, 353
 Eastabrooke, Carr v., 630
 Easterson, Bryant v., 518
 Eastman v. Baker, 572
 Eastwood v. Avison, 580
 — Biggar v., 491, 668
 — v. Clarke, 372
 — v. Lockwood, 234, 622
 — Phillips v., 656
 — Thomson v., 154
 — v. Vinke, 630
 Easum v. Appleford, 191, 202
 Eate, Castle v., 416
 Eaton, *In re*; Daines v. Eaton, 447
 — v. Barker, 525
 — Daines v., 447
 — v. Hewitt, 457
 — Muskett v., 456
 — v. Watts, 400
 Eavestaff v. Austin, 647
 Eccard v. Brooke, 540
 Eccles v. Birkett, 465
 — v. Cheyne, 642
 Eckersley v. Platt, 38, 46
 Eckett, Debnay v., 431
 Eckford, Haldane v., 4
 Eddel's Trusts, *In re*, 145, 261, 455, 521
 Eddowes, *Re*, 609
 — v. Eddowes, 260
 — Kirk v., 633
 Eden, Ellis v., 110, 161
 — v. Wilson v., 133
 Edge, *In bonis*, 58
 — v. Salisbury, 271, 302
 Edgell, Sullivan v., 467
 Edgeworth v. Edgeworth, 456
 — v. Johnston, 633
 Edlin, Doe d. Shelley v., 55, 360
 Edmeades, Pearce v., 253, 254, 422
 Edmonds v. Edmonds, 77, 486
 Edmondson's Estate, *In re*, 460, 467
 Edmondson v. Crosthwaite, 441
 — Gregory v., 398, 401
 Edmunds v. Fessey, 240
 — Goodier v., 209, 480
 — v. Low, 630, 631
 Edward v. Astley, 33
 Edwards, *In re*; Edwards v. Edwards, 577
 — *Re*; Rowland v. Edwards, 106
 — v. Barnes, 175
 — Blodwell v., 245
 — Brownsword v., 570, 571
 — v. Champion, 329
 — Darlow v., 228
 — Dickin v., 118, 679
 — v. Edwards (15 B. 357), 532, 533
 — v. Edwards ([1894] 3 Ch. 644), 577
 — Goodman v., 182
 — v. Grove, 387
 — v. Hall, 314, 317, 318, 319
 — v. Hammond, 454
 — v. Jones (33 B. 348), 333
 — v. Jones (35 B. 474), 623
 — Lysaght v., 186, 216
 — Pillers v., 517
 — Roberts v., 280, 281
 — Rowland v., 106
 — v. Saloway, 640
 — Seccombe v., 512
 — v. Tuck, 209, 492
 — Vick v., 330
 — v. West, 216, 217
 — Whitehouse v., 133, 635
 — Yem v., 436
 Eedle, Laxton v., 415
 Eeles, *In bonis*, 38
 Effingham, Earl of, Lord Dorchester v., 599
 Egerton v. Earl Brownlow, 452, 497, 597
 — v. Massey, 179
 Egremont, Earl of, Burrell v., 435
 Kidsforth v. Armstead, 373
 Eisdale v. Hammeraly, 368
 Ekina, Green v., 146
 — v. Morris, 163
 Klam, Ibbotson v., 144, 440
 Elborne v. Goode, 494, 657
 Elcock, Mapp v., 652
 Elcom, *In re*; Layborn v. Grover Wright, 169
 Elcum, Longmore v., 415
 Eldridge, Armstrong v., 422
 Elias v. Snowdon Slate Quarries, 429
 Elkin, Pinbury v., 584
 Ellames, Bradish v., 191
 Ellice, *In bonis*, 43
 — Bulling v., 227
 Ellick v. Cox, 233
 Ellicombe v. Gompertz, 582
 Ellicott, Lindsay v., 285
 Elliot v. Montgomery, 671
 Elliott, *In bonis*, 19

- Elliott, *In re***; **Elliott v. Johnson**, 300
 — **Cornford v.**, 313, 314
 — **v. Davenport**, 638, 639
 — **v. Dearsley**, 139, 141, 673, 677
 — **v. Elliott**, 167, 207, 231, 257
 — **v. Johnson**, 300
 — **v. Smith**, 526, 529
 — **Stammers v.**, 133, 134
Ellis' Trusts, *In re*, 515
Ellis, *In bonis*, 29
 — **Barrymore v.**, 517
 — **v. Eden**, 110, 161
 — **v. Ellis** (23 W. R. 382), 399
 — **v. Ellis** (1 Sch. & L. 1), 463
 — **v. Houston**, 242
 — **Hughes v.**, 506
 — **Kelsey v.**, 422, 544
 — **Knight v.**, 393
 — **v. Lewis**, 94
 — **v. Maxwell**, 491, 494
 — **v. Selby**, 187, 405
 — **v. Smith**, 24
 — **Thornton v.**, 443
 — **v. Walker**, 116
Ellison v. Airey, 235
 — **Clavering v.**, 497, 503
 — **Lyddon v.**, 233
 — **v. Thomas**, 237
Elms v. Elms, 44
Elmsley v. Mitchell, 316
Elphinstone, Richardson v., 630
Eladen v. Eladen, 53
Elce v. Elce, 531, 536
Elaley, Foster v., 86
Elstone, Collins v., 23
Elton v. Eason, 391
 — **v. Montague**, 151
 — **v. Shepherd**, 394
 — **v. Stenlake**, 349, 488
Elve v. Boyton, 379
Elvey, Doe d. Gilman v., 326, 344
Elvin, Harrison v., 31
Elwes v. Causton, 120
 — **Brudenell v.**, 481, 523
Elwin v. Elwin, 569
Elworthy, Tanner v., 436
Ely, *Re*; **Tottenham v. Ely**, 225
Emerson, *In bonis*, 24
 — **v. Boville**, 56
Emery's Estate, *Re*, 249
Emery v. England, 233
Emley v. Davidson, 10, 314, 319
Emmet's Estate, *In re*; **Emmet v. Emmet**, 259
Emmins v. Bradford, 236
Emperor v. Rolfe, 564
Empson, Hughes v., 377
Emuss v. Smith, 103, 132, 170, 217
Engelhardt v. Engelhardt, 414
England, Emery v., 233
 — **Watson v.**, 560
English, *In bonis*, 11
 — ***Re***, 339
Enia, Arnold v., 447
Eno v. Tatham, 140
Enohin v. Wylie, 3, 4, 188
Enraght, Carthew v., 262, 609
Enthoven, Montefiore v., 509
Entwistle v. Davis, 313, 314
Eppe, Saunders v., 361
Equitable Reversionary Interest Society, Burnaby v., 331
Errington, Bathurst v., 233
 — **Carrick v.**, 647
Errol, Earl of, Carr v., 590, 592
Esmonde, Langdale v., 119
Espinasse v. Luffingham, 173
Essex, Earl of, Astley v. (6 Ch. 898), 155
 — **Earl of, Astley v.** (18 Eq. 290), 496, 506
 — **v. Clement**, 560
 — **Earl of, Cockerell v.**, 130, 155, 156, 592, 599
Etches v. Etches, 457, 542
Ethel Brown, *In re*, 83
Ettricke v. Ettricke, 332
Eustace, *In bonis*, 42
 — **v. Robinson**, 600
Evan, Griffiths v., 273, 355, 400
Evans, *In re*; **Evans v. Evans**, 333
 — ***In re***; **Welch v. Chennell**, 386
 — **v. Ball**, 211
 — **d. Brooke v. Astley**, 578
 — **v. Charles**, 292
 — **v. Cockeram**, 136, 679
 — **v. Crosbie**, 163
 — **v. Dallow**, 45
 — **v. Davies**, 243
 — **Doe d. Evans v.**, 617
 — **Doe d. Williams v.**, 62
 — **v. Evans** (23 B. 1), 196, 197
 — **v. Evans** ([1892] 2 Ch. 173), 354
 — **v. Evans** (34 Ch. D. 697), 333
 — **v. Evans** (12 W. R. 508), 403
 — **v. Evans** (25 B. 81), 556
 — **v. Evans** (10 Ad. & E. 228), 617
 — **v. Evans** (17 Sim. 107), 618, 656
 — **Field v.**, 516
 — **Greenwood v.**, 437, 438
 — **v. Harris**, 258
 — **v. Hillier**, 492, 494
 — **Hughes v.**, 402
 — **v. Jones**, 177, 193, 268
 — **McClure v.**, 633
 — **v. Massey**, 242, 245
 — **Philps v.**, 238, 291
 — **v. Roberts**, 431
 — **Robinson v.**, 291
 — **v. Rosser**, 499
 — **v. Salt**, 230
 — **v. Scott**, 458
 — **Smith v.**, 24
 — **Thurston v.**, 201
 — **v. Tripp**, 111

- Evans v. Walker, 413, 481
 — d. Weston v. Burtenshaw, 277
 — White v., 313, 654
 — v. Williamson, 166
 — Worthington v., 502
 — v. Wyatt, 143
 Evanturel v. Evanturel, 497, 498
 Evelyn, Burley v., 482
 Everall v. Browne, 188
 Everett v. Cooke, 570, 571
 — v. Everett, 164
 Evers v. Challis, 482, 522, 523
 Evetts, Crofts v., 800
 Ewart, Doe d. Cadogan v., 359, 360
 Ewen v. Franklin, 30
 Ewens v. Addison, 502
 Ewer v. Hayden, 170
 Ewing, *In bonis*, 70
 — v. Anderson, 502
 — MacLae v., 52, 54
 — v. Orr-Ewing, 4
 Exeter, Corporation of, A.-G. v., 301
 Exmouth, *In re* Viscount; Viscount
 Exmouth v. Praed, 485, 496, 592,
 594
 Eyden, Gibbins v., 141, 659
 Eynon, *In bonis*, 30
 Eyre, *Re*; Eyre v. Eyre, 367
 — Doe d. Blomfield v., 525
 — v. Eyre, 367
 — Gower v., 426
 — v. Marsden, 492, 494, 536,
 553, 560, 657
 Eyres, Starkey v., 271
 Eyston, *Ex parte*; *In re* Throck-
 morton, 608
 — Bruno v., 204
 Eyton, Davies v., 481
 — Rowley v., 60
- FADEN, Varlo v., 441, 491
 Fair, Acheson v., 395, 609
 Fairer v. Park, 120, 681
 Fairfield v. Bushell, 268
 — v. Morgan, 572
 Fairland v. Percy, 382
 Fairtlough v. Johnstone, 89
 Falconer, Drinkwater v., 114, 129
 Falkland, Lady, Strode v., 181
 Falkner v. Butler, 191, 265
 — v. Grace, 677
 — v. Lord Wynford, 263
 Fane, Wyndham v., 235
 Farhall v. Farhall, 377
 Farmer, Baker v., 120, 662
 — v. Bradford, 203
 — v. Mills (4 Russ. 86), 662
 — Mills v. (1 Mer. 55), 303
 Farn, Warburton v., 369
 Farncombe's Trusts, *In re*, 117, 644
 Farnie, Harvey v., 5
 Farquhar, *In bonis*, 51
- Farquhar v. Hadden, 135
 Farquharson v. Cave, 10
 — v. Floyer, 659
 Farr v. Hennis, 404
 — Meredith v., 288, 242
 — Smith v., 542
 Farra, Abd-ul-Messih v., 4, 6
 Farrand, Braddon v., 653
 Farrant, Brown v., 53
 — v. Carter, 168
 Farrar v. Earl of Winterton, 132
 Farrer v. Barker, 469
 — v. St. Catherine's Coll., 43,
 226, 613, 659
 Farrington v. Knightley, 653
 — Maskell v., 670
 Farrow v. Smith, 513
 Farthing v. Allen, 531
 Farwell, Williamson v., 481, 486
 Fasulo, Daintree and Butcher v., 28
 Faulding's Trusts, 543
 Faulds v. Jackson, 27, 28, 29
 Faulkener v. Hollingworth, 569
 Faversham, Mayor of, v. Ryder, 318
 Favre, Bloxam v., 3
 Fawcett, Doe d. Atkinson v., 338
 Fay, Boylan v., 377
 — v. Fay, 337, 343
 Fazakerley v. Ford, 502, 589
 — v. Gellibrand, 629
 Feakes v. Standley, 583
 Fearnley, Parker v., 672
 Fearon v. Fearon, 89
 Featherstone's Trusts, *In re*, 249, 645
 Featherstone, Doe d. Atkinson v.,
 350
 Fee v. M'Manus, 120, 192
 Felgate, Parker v., 21
 Fell, Beaumont v., 221
 — v. Biddulph, 643
 — Trimmell v., 18
 Fellowes, Berens v., 277
 — Caldwell v., 331
 Fellowes, Douglas v., 222
 — Pett v., 152
 Fells, *In re*; *Ex parte* Andrews, 384
 Feltham's Trusts, 220
 Fenn v. Death, 247
 Fennell, Hall v., 382
 Fenner, Dunk v., 350, 676
 Fenton, Conway v., 381
 — v. Hawkins, 401, 647
 — v. Newin, 406, 651
 — v. Wills, 657
 Fenwick, *In bonis*, 35, 41
 — v. Clarke, 662
 — Gael or Gall v., 188, 189, 141
 — v. Potts, 362
 — Winn v., 263, 471
 Ferguson, Askin v., 146, 595
 — v. Benyon, 219
 — v. Dunbar, 554
 — v. Ferguson, 482, 521
 — Horridge v., 540
 Ferguson-Davie v. Ferguson-Davis, 12

- Fernyhough, Coppin *v.*, 131, 436
 Ferrand *v.* Wilson, 429, 485
 Ferraris, Countess, *v.* Lord Hertford, 63, 64
 Ferrera, Petre *v.*, 164
 Ferrick, Adams *v.*, 135
 Ferrier, Brine *v.*, 122, 123
 Ferries *v.* Jay, 205
 Ferris, Gallagher *v.*, 383
 — Tee *v.*, 65
 Fessey, Edmunds *v.*, 240
 Festing *v.* Allen (5 Ha. 575), 151, 152, 153
 — *v.* Allen (12 M. & W. 279), 455
 — *v.* Taylor, 157
 Fetherston *v.* Fetherston, 342, 349, 352, 355
 Fetherstonhaugh, Tighe *v.*, 188
 Fewkes, Barrs *v.*, 294, 398
 Finch *v.* Combe, 34
 — Jenner *v.*, 29, 41
 Ffolliot, Moore *v.*, 263, 520
 Ffrench, *In bonis*, 25
 — Campbell *v.*, 617
 Field, *Re*, 162
 — *v.* Evans, 516
 — Fitzgerald *v.*, 54, 191, 471
 — Mayd *v.*, 17, 19, 627, 664
 — *v.* Mostin, 631
 — *v.* Peckett (9 W. R. 526), 164
 — *v.* Peckett (29 B. 568), 211
 — Pridie *v.*, 156
 — *v.* Seward, 636
 — Wainman *v.*, 194, 484
 — Whitton *v.*, 555
 — Wray *v.*, 123
 Fielden *v.* Ashworth, 271, 283
 — Firth *v.*, 229
 Fielding *v.* Preston, 119
 — *v.* Walshaw, 10, 11
 Fillingham *v.* Bromley, 497
 Filliter, Pushman *v.*, 399
 Finch, *In re*; Abbiss *v.* Burney, 477, 588
 — Colyer *v.*, 373, 375
 — *v.* Finch (1 P. & D. 371), 46
 — *v.* Finch (1 Ves. Jun. 534), 625
 — Harris *v.*, 149
 — *v.* Hattersley, 672
 — Hatton *v.*, 421
 — *v.* Hollingsworth, 273
 — *v.* Lane, 455
 — Le Grice *v.*, 116
 — Nourse *v.*, 653
 — *v.* Squire, 316
 Finden, Shallcross *v.*, 671
 — *v.* Stephens, 86
 Findon *v.* Findon, 524
 — Gough *v.*, 10
 Finlason *v.* Tatlock, 547
 Finlay, Willett *v.*, 129
 Finney's Estate, *Re*, 185
 Finney *v.* Grice, 164
 Firth *v.* Fielden, 229
 Fischer *v.* Popham, 28
 Fish, *In re*; Bennett *v.* Bennett, 389
 — *In re*; Ingham *v.* Rayner, 238, 266
 Fisher, *In re*, 366
 — *v.* Brierley, 125, 150
 — Brown *v.*, 21
 — Crozier *v.*, 557
 — Davies *v.*, 207, 466, 467
 — Gibson *v.*, 253, 254
 — Hall *v.*, 108, 109, 170
 — *v.* Hepburn, 187
 — *v.* Moore, 557
 — Morrell *v.* (4 Eq. 591), 103
 — Morrell *v.* (4 De G. & S. 422), 665
 — Thompson *v.*, 598
 — *v.* Webster, 327, 582
 — Whiteway *v.*, 617
 Fisk *v.* A.-G., 304, 308
 Fitch *v.* Weber, 214, 648
 Fitzgerald's Estate, *In re* (L. R. 1 Eq. 453), 434
 — Settled Estates, *In re*; Saunders *v.* Boyd, 236
 Fitzgerald, *In re* (58 L. J., Ch. 662), 282
 — *In re*; Adolph *v.* Dolman, 669
 — A.-G. *v.*, 8
 — Bridgman *v.*, 164, 165
 — Cole *v.*, 164, 190
 — *v.* Field, 54, 191, 471
 — *v.* Fitzgerald, 638
 — Genery *v.*, 146
 — Roddy *v.*, 348, 350, 352, 354, 610
 — Smith *v.*, 117, 618
 — Stretton *v.*, 505, 573, 595
 FitzGibbon, Pike *v.*, 18
 Fitzhenry *v.* Bonner, 608
 Fitzmaurice, Rochfort *v.*, 598
 Fitzpatrick *v.* Waring, 379
 Fitzroy, *In bonis*, 35
 — *v.* Howard, 181
 Fitzsimons *v.* Fitzsimons, 93
 — Valentine *v.*, 287
 Fitzwilliams *v.* Kelly, 119, 134, 135
 Fladgate, Perkins *v.*, 187, 250
 Flamank, *Ex parte*, 219
 Fleck, *In re*; Colston *v.* Roberts, 141
 Fleetwood, *In re*; Sidgreaves *v.* Brewer, 64, 100, 187, 300
 — London *v.*, 602
 Fleming *v.* Brook, 165, 189
 — *v.* Buchanan, 663
 — *v.* Burrows, 187, 189
 — Ford *v.*, 114, 117
 Fletcher, *In bonis*, 13
 — *Re*; Doré *v.* Fletcher, 461
 — *In re*; Gillings *v.* Fletcher, 629, 634
 — Arkell *v.*, 170

- Fletcher, A.-G. v., 332, 367
 — Davenport v., 118
 — Doré v., 461
 — v. Fletcher (4 Ha. 79), 10
 — v. Fletcher (7 L. R. Ir. 40), 207
 — v. Fletcher (9 L. R. Ir. 301), 251
 — v. Fletcher (3 D. F. & J. 775), 288
 — Gillings v., 629, 634
 — v. Smiton, 176
 — Wynne v., 503
 Flewitt, Wilmott v., 537, 560
 Flight, Bizzey v., 63
 Flinn v. Jenkins, 253
 — See v., 586
 Flint, Brocklehurst v., 637
 — v. Hughes, 399
 — v. Warren, 214
 Flood, Dunn v., 475
 — Greene v., 606, 647
 — Lefroy v., 400
 — v. Russell, 47
 Flower, *In re*, 376
 — *In re*; Edmonds v. Edmonds, 77, 486
 — *Re*; Matheson v. Goodwyn, 270, 448, 546
 — v. Buller, 18
 — Palmer v., 405
 Floyer v. Bankes, 479
 — Farquharson v., 659
 Foden, Milnes v., 10
 Foley, Bradford v., 658
 — v. Burnell, 439, 592, 593
 — v. Gallagher, 549
 — Lingon v., 674
 — v. Parry, 400, 415
 Follett v. Pettman, 44
 — v. Tyrer, 511
 Fonblanque, Cox v., 510
 Fonnereau v. Poyntz, 115, 662
 Fooks, Pride v. (2 B. 430), 491
 — Pride v. (3 De G. & J. 252), 581
 — Slade v., 266
 Foorde, Hayes d. Foorde v., 347, 348, 349
 Foot v. Cunningham, 450
 — v. Stanton, 69
 Foote, Hamilton v., 215
 — Hodge v., 551
 Forbes v. Ball, 206
 — v. Forbes, 618
 — v. Gordon, 63
 — v. Hardcastle, 314
 — v. Hume, 311
 — v. Peacock, 372
 — v. Richardson, 417, 418
 Force, Whiting v., 567
 Ford, *Re*; Patten v. Sparks, 286
 — Angermann v., 150, 292
 — v. Batley, 411
 — v. De Pontes, 46, 614
 — Doe d. Lees v., 524
 Ford, Fazakerley v., 502, 589
 — v. Fleming, 114, 117
 — v. Ford, 180
 — v. Fowler, 401
 — v. Rawlins, 468
 — Shaw v., 505
 — v. Tynte, 425
 Fordham v. Speight, 403
 Fordyce v. Bridges, 476
 Foreman, Harrison v., 526
 Forester, Wolmer v., 145
 Forman, Thwaites v., 661
 Forrest v. Prescott, 675
 — v. Whiteway, 329
 Forrester v. Leigh, 659, 667
 — v. Smith, 555, 556
 Forristall, Scott v., 657
 Forsbrook v. Forsbrook, 345, 419, 488, 603, 604
 Forshaw, Crawford v., 367
 Forster's Estate, *In re*, 413
 Forster v. Thompson, 671
 Fortescue v. Gregor, 637
 — Jordan v., 613
 Forth v. Chapman, 582
 Fossick, Doe d. Moreton v., 179, 180
 Foster, *In bonis*, 80
 — *In re*; Lloyd v. Carr, 449
 — v. Cantley, 637
 — v. Cook, 658, 667
 — Cowx v., 205, 206
 — v. Elaley, 86
 — Gotch v., 151, 461
 — Gow v., 441
 — Halton v., 281
 — Hathorn v., 523
 — v. Hayes, 579
 — Honywood v., 92
 — v. Ley, 155
 — Partridge v., 524
 — v. Lord Romney, 419, 457
 — v. Smith, 417, 418
 — v. Wybrants, 269, 393
 Fothergill, Bell v., 45
 Foulds, Johnson v., 235, 461
 Foulis, Lesson v., 177
 Foulkes v. Williams, 204
 Foulsham, Mathews v., 111
 Foulshaw, Matthews v., 250
 Fountain, Hooley v., 567
 Fontaine v. Tyler, 113, 116
 Foudrin v. Gowdey, 630, 676
 Fowler's Trust, 97
 Fowler, *In re*; Fowler v. Odell, 381, 430
 — Davies v., 115
 — Ford v., 401
 — v. Fowler (33 B. 616), 307
 — v. Fowler (3 P. W. 353), 629
 — v. Garlike, 405
 — Kelly v., 584
 — v. Lightburne, 361
 — v. Odell, 381, 430
 — v. Willoughby, 118
 Fox's Will, *Re*, 251, 555

- Fox, *Re*;** *Fox v. Fox*, 396
 — *Castle v.*, 105, 111
 — *v. Collins*, 224
 — *v. Fox* (62 L. T. 762), 396
 — *v. Fox* (27 B. 301), 399
 — *v. Fox* (19 Eq. 286), 465
 — *Hodgson v.*, 133
 — *Lady Lanesborough v.*, 478, 587
 — *v. Lowndes*, 314
 — *Marston v.*, 35, 55, 56
 — *Porter v.*, 483
 — *v. Shipman*, 175
 — *Teague v.*, 448
Foxen v. Foxen, 661
Foxhall, Warmaley v., 332
Foxwell, King v., 6, 8
 — *v. Lewis*, 215
Frampton, Torret v., 329
 — *Turner v.*, 585
Francis v. Clemow, 673
 — *v. Grover*, 33
 — *Viner v.*, 255
Franco, Torres v., 471
Frank, Driver v., 232
 — *v. Muzeen*, 508
 — *v. Stovin*, 355
Franklin, Ewen v., 30
 — *Herrick v.*, 392
 — *Houghton v.*, 154
 — *v. Lay*, 344
Franks v. Brooker, 229
 — *Norreys v.*, 130, 212
 — *v. Price*, 456, 580
 — *Sanders v.*, 390
Fraser, *In bonis* ([1891] P. 285), 71
 — *In bonis* (2 P. & D. 183), 82
 — *In re*; *Yeates v. Fraser*, 310
 — *Abbott v.*, 305, 306
 — *v. Byng*, 123
 — *Colvin v.*, 46
 — *Duguid v.*, 615, 644
 — *v. Fraser*, 466
 — *v. Murdoch*, 388, 389
 — *Robertson v.*, 332
 — *v. Piggott*, 241
 — *Yeates v.*, 310
Frayne v. Taylor, 216
Fream v. Dowling, 679
Freeland v. Pearson, 76, 263, 639, 642
Freeman v. Bowen, 509
 — *Bremmer v.*, 3
 — *v. Duke of Chandos*, 180
 — *Doe v.*, 458
 — *v. Freeman*, 42
 — *Martin v.*, 305, 307, 308, 317, 320
 — *v. Simpson*, 150
Freer, *In re*; *Freer v. Freer*, 127
Freke v. Calmady, 89, 209, 381, 430, 431
 — *v. Lord Carbery*, 1, 476
Freman v. Whitbread, 447
Frema, *In re*; *Frema v. Logan*, 203, 261
 — *v. Clement*, 204
 — *v. Logan*, 203, 261
French's Case, 40
French v. Caddell, 583
 — *v. Chichester*, 675
 — *Corbyn v.*, 313, 317, 641
 — *v. French*, 326, 328
 — *Milltown, Earl of v.*, 150
Frenchman, Turke v., 579
Frere v. Winslow, 662
Freund v. Steward, 298, 310
Frewen v. Hamilton, 415
Frewin v. Frewin, 218
 — *Jones v.*, 541
Fricker, Doe d. Pottow v., 338
Friend, Durrant v., 128, 238
 — *Pembroke v.*, 139, 140
Frigout, Peacock v., 481, 486
Friswell v. Moore, 52
Frith, *In bonis*, 31
 — *Crafton v.*, 307, 318
 — *and Osborne, *In re**, 364
Frobisher, Taylor v., 460
Froggatt v. Wardell, 326
Frogley v. Phillips, 266
Frogmorton v. Holiday, 339
 — *d. Robinson v. Wharrey*, 342
Frost, *In re*; *Frost v. Frost*, 476
 — *Doe d. King v.*, 337, 583, 584
 — *v. Frost*, 476
 — *King v.*, 550, 552, 553, 558
Frowde v. Hengler, 448
Fruer v. Bouquet, 654
Fry's Case, Lady Ann, 450, 457
Fry, *Re*, 226
 — *v. Capper*, 487
 — *v. Fry*, 615
 — *Porter v.*, 496
Fryer, Allum v., 372
 — *D'Aglié v.*, 446
 — *Hensman v.*, 117, 659, 662, 667
 — *v. Morris*, 129
 — *v. Rankin*, 161
 — *Sowerby v.*, 426
Fuge v. Fuge, 651
Fulbrook, Curtis v., 372
Fulford, Hilliard v., 469
Fullalove, Occleston v., 245, 246
Fulleck v. Atkinson, 52
Fuller, *In bonis*, 25
 — *v. Chamier*, 353
 — *Crookenden v.*, 1
 — *Mann v.*, 126, 617
 — *Roxburgh v.*, 124
Fullerton v. Martin, 176, 448
Fulton v. Andrew, 21, 22
 — *Casement v.*, 24, 29
Funnell, Grice v., 616
Furber, Hunt Foulston v., 411
Furley v. Hyder, 447
Furneaux v. Rucker, 148
Furniss v. Phear, 222

- Furnivall, *Eager v.*, 642
 Furse, Yonge *v.*, 136, 433, 500
 Furze's Contract, *In re Venn and*, 375
 Fysh, Blackman *v.*, 262, 508
 Fytton *v.* Booth, 290
- G.*, *In re*, 85
 Gabb *v.* Prendergast, 238, 240
 Gadd, *In re*; Eastwood *v.* Clarke, 372
 Gadsden, Stephen *v.*, 397
 Gael *v.* Fenwick, 138, 139, 141
 Gaffee, *Re*, 516
 Gains *v.* Rouse, 223
 Gainsford *v.* Dunn, 205, 673
 Gaisford, Jenkyns *v.*, 24
 Gaitskell's Trust, *Re*, 562, 563, 564
 Galbraith, Sullivan *v.*, 413
 Gale *v.* Gale, 129, 203
 — Griffiths *v.*, 642
 Gall *v.* Fenwick, 138, 139, 141
 Gallagher *v.* Ferris, 383
 — Foley *v.*, 549
 — Johnson *v.*, 664
 Galland *v.* Leonard, 533
 Gallard *v.* Hawkins, 650
 Galley *v.* Barrington, 578
 Gallimore *v.* Gill, 672
 — Jennings *v.*, 291
 Gallini, Doe d. Gallini *v.*, 603
 — *v.* Noble, 110
 Gally, *In bonis*, 3
 Galway, Lord, Bodens *v.*, 391
 Gamboa's Trust, 280
 Gane, Gillett *v.*, 228
 Ganly *v.* Dowling, 163
 Ganu *v.* Gregory, 32, 33
 Gansden, *In bonis*, 29
 Garbut *v.* Hilton, 501
 Gard, Mitchell *v.*, 23, 72
 Garden *v.* Poulteney, 327
 Gardener, Boosey *v.*, 524
 Gardiner's Estate, *In re*; Garratt *v.* Weeks, 257, 259
 Gardiner *v.* Courthope, 43, 62, 67
 — *v.* Jellicoe, 589, 591
 — Mathews *v.*, 336, 574
 — *v.* Slater, 500
 — *v.* Stevens, 607
 — Stringer *v.*, 222
 Gardner, *Re*; Long *v.* Gardner, 151
 — *v.* Barber, 415
 — Boosey *v.*, 394
 — *v.* Hatton, 116, 129
 — Long *v.*, 151
 — Pearce *v.*, 365
 — *v.* Sheldon, 604, 605
 — Welch *v.*, 38
 Garfitt *v.* Allen, 670
 Garland, *Ex parte*, 382
 — *v.* Beverley, 226, 276
 — *v.* Brown, 480, 481
 — Lester *v.*, 498
 — *v.* Mead, 74, 181
- Garland, R. *v.*, 74
 Garlick, Doe d. Sams *v.*, 339
 Garlike, Fowler *v.*, 405
 Garman, Gray *v.*, 544
 Garner *v.* Hannyngton, 439
 Garnet, Pierson *v.*, 400
 Garnett, *In bonis*, 61
 — *v.* Acton, 218
 — Armitage *v.*, 441, 442
 — Riley *v.*, 381, 455
 Garratt *v.* Weeks, 257, 259
 Garrett *v.* Cockerell, 585
 — Niblock *v.*, 229
 — Pierson *v.*, 403
 Garrick *v.* Lord Camden, 282
 Garrod, Brooke *v.*, 174
 — Doe d. Garrod *v.*, 345
 Garth *v.* Baldwin, 391
 — Colleton *v.*, 130
 — *v.* Cotton, 423, 427
 — *v.* Meyrick, 223
 — Phillips *v.*, 283
 Garvey *v.* Hibbert, 249
 Garwood, Hickabe *v.*, 251
 Gascoyne, Green *v.*, 494
 Gaskell's Trusts, *Re*, 515
 Gaskell, Creswick *v.*, 563
 Gaskin, Denn *v.*, 338
 — *v.* Rogers, 100, 168, 663
 Gaskoin, Dowson *v.*, 159
 Gas Light and Coke Co. *v.* Towse, 380, 435
 Gassiot, Ivison *v.*, 189
 Gatenby *v.* Morgan, 526
 Gateshead, Mayor of, *v.* Hudspeth, 298, 299, 306
 Gath *v.* Barton, 452
 Gatti, *In bonis*, 2
 Gaunt, Target *v.*, 580
 Gawthorne, Goodale *v.*, 146
 Gayford, Plowden *v.*, 396
 Gaynon *v.* Wood, 631
 Gaze *v.* Gaze, 28
 — Love *v.*, 401, 651
 Geare, O'Dwyer *v.*, 67, 68
 Gearing *v.* Shenton, 342
 Geary, Door *v.*, 110
 Geaves *v.* Price, 41, 80
 Geck, *Re*; Freund *v.* Steward, 298, 310
 Geddes, Vaudry *v.*, 465
 Gee, Carmichael *v.*, 417
 — *v.* Liddell, 549, 630
 — *v.* Corporation of Manchester, 534
 — Measure *v.*, 349
 Geldard, Robinson *v.*, 668
 Geldart, Blamire *v.*, 618
 Gellatly, Brown *v.*, 444, 446, 447
 Gellibrand, Fazakerley *v.*, 629
 Gelliland *v.* Crawford, 432
 Genery *v.* Fitzgerald, 146
 Genge, Hott *v.*, 28
 Gent *v.* Harrison, 427, 429
 Gentili, *In bonis*, 1
 Gentry, *In bonis*, 37

- Geoghegan, Doucet v., 8
 George, *In re*, 149, 152, 385
 — Andrews v., 636
 — Briggs v., 659
 — King v., 187
 — Rees v., 636
 — Taylor v., 400
 Gerard, Cook v., 605
 — Soule v., 573
 — Walmsley v., 588
 Gerrard v. Butler, 397
 Gethin v. Allen, 167
 Getting, Burnie v., 161
 Gibbens v. Cross, 56
 Gibbes' Settlement, *In re*; White v.
 Randolf, 42, 202
 Gibbes, Pickwick v., 152
 Gibbins v. Eyden, 141, 659
 Gibbons, Berry v., 376
 — Brackbury v., 261, 521
 — v. Caunt, 55
 — Cornaby v., 32
 — v. Gibbons, 263
 — v. Langdon, 537
 Gibbs, Blake v., 166
 — Davis v., 182
 — v. Lawrence, 190
 — v. Rumsey, 213, 294, 406
 — Sharshaw v., 433
 — v. Tait, 398
 Giblett, Child v., 536
 — v. Hobson, 319
 Gibson, *Re*, 616, 644
 — *In re*; Mathews v. Foulsham,
 111
 — Baker v., 287
 — Blackhall v., 341, 355, 356
 — v. Bott, 149, 155, 447
 — Dean v., 187
 — v. Fisher, 253, 254
 — v. Gibson, 95
 — v. Lord Montfort, 674
 — v. Representative Church
 Body, 303
 — v. Wey, 17
 — v. Wright, 288
 Giddings v. Giddings, 436, 438
 Gigg v. Bradley, 345
 Gilbert, Milne v., 282
 Gilbert, *In bonis*, 34
 — *Re*; Daniel v. Matthews,
 541
 — Burtenshaw v., 46, 57
 — Cutto v., 42
 — v. Lewis, 514
 — Singleton v., 260
 — Tuke v., 466
 Gilbertson v. Gilbertson, 665, 678
 Gilchrist, *Ex parte*, 664
 Giles, *Re*, 167
 — Barker v., 329
 — Bignold v., 421
 — v. Giles (1 Kee. 655), 227
 — v. Giles (8 Sim. 360), 541, 543,
 544
 Giles, Green v., 167, 577
 — v. Horner, 369
 — Melsom v., 536
 — v. Melsom, 594
 — v. True, 142
 — v. Warren, 37
 Gill, *In bonis*, 61
 — v. Bagshaw, 221
 — v. Barrett, 473
 — Gallimore v., 672
 — Lightbourn v., 505
 — v. Pearson, 504
 — v. Shelley, 240
 Gillam v. Taylor, 302
 Gillan v. Gillan, 303
 Gillard, Bartlett v., 630
 — Doe d. Gillard v., 357
 Gillaume v. Adderley, 114, 116
 Gillespie v. Alexander, 124
 Gillett, Castle v., 673
 — v. Gane, 226
 — v. Wray, 500
 Gilliatt, Barkdale v., 156
 Gillies v. Longlands, 203
 Gillings v. Fletcher, 629, 634
 Gillman's Estate, *In re*, 413
 Gillman v. Daunt, 257
 Gillooly v. Plunkett, 155, 666
 Gilloft, Denn v., 342
 Gillow v. Burne, 53
 — Harvey v., 642
 — Rammell v., 563, 565
 Gilman v. Elvey, 326, 344
 Gilmore, Dorrian v., 301
 Gimblett v. Purton, 257, 258
 Gingell, Marshall v., 362
 Giraud v. Hanbury, 653
 Girdler, Capel v., 131
 Girdlestone v. Creed, 322
 — v. Doe, 541
 Gisborne v. Gisborne, 385
 — Younghusband v., 407
 Gissing, Morrell v., 558
 Gittings v. M'Dermott, 280
 Given v. Massey, 138, 174
 Gladding v. Yapp, 653
 Gladstone, A.-G. v., 303
 — Syer v., 88
 — Walsh v., 299
 Glanvill v. Glanvill, 146, 460
 Glasbrook, Woodward v., 573
 Glascock, Shires v., 29
 Glass, Dowse v., 630
 — v. Richardson, 366
 Gleadon v. Leatham, 157
 Glendenning v. Glendenning, 160
 Glengall, Earl of, Lady Thynne v.,
 626
 Gloucester, Corporation of, Trye v.,
 320
 — Corporation of, v. Wood, 303,
 398, 402
 Glover, *In bonis*, 24
 — v. Hartcup, 631
 — Martin v., 188, 283

- Glover v. Monckton, 588
 — Reeves v., 53
 — v. Smith, 69
 — Tracey v., 337
 Glubb v. A.-G., 319
 Glyn, Harding v., 271, 273, 401,
 403
 — Morris v., 314
 — Spurway v., 118, 149
 Glynes, Munt v., 599
 Glynn v. Oglander, 11
 Goble, Cole v., 582
 Goblet v. Beechey, 101
 Goddard's Trusts, 471
 Goddard, A.-G. v., 817
 Godden, *In re*; Teague v. Fox, 448
 — v. Crowhurst, 407
 Godfrey, *In re*, 45
 — *In re*; Thorne-George v.
 Godfrey, 517
 — v. Bryan, 334
 — v. Davis, 238, 241, 256
 — v. Godfrey, 401, 403, 404
 — v. Harben, 664
 — Lord v., 444
 — Thorne-George v., 517
 Godlee, Head v., 214
 — Reynolds v., 215
 Godolphin, Lord, Duke of Marl-
 borough v., 639
 Godrich, Sheddin v., 54, 96
 Godsalue, Cox v., 166
 Godson, Holmes v., 505
 Goff, Doe d. Strong v., 342
 Going v. Hanlon, 340
 — Quinhampton v., 61, 634
 Goll, Blague v., 107
 Goldie, Swabey v., 254
 Golding, Gray v., 524
 — v. Haverfield, 629
 Goldiney v. Crabb, 393
 Golds v. Greenfield, 640
 Goldschmidt, Deffis v., 258
 Goldamid, Lucas v., 273
 — Straus v., 299
 Goldwin, Chambers v., 152
 Golightly, Boydell v., 280
 Gomm, London and South Western
 Railway v., 475
 Gompertz, Ellicombe v., 582
 — v. Gompertz, 397
 Gonne v. Cooke, 569
 Gooch v. Gooch, 258, 260, 480, 481
 Good v. Good, 342
 — v. Lickorish, 407
 — Shannon v., 356
 — Tucker v., 266
 Goodacre, Arden v., 507
 — v. Smith, 22
 Goodale v. Gawthorne, 146
 Goodban, Lemage v., 41, 42
 Goodbun, Clifton v., 241
 Goode, Elborne v., 494, 657
 Goodenough, Rogers v., 43, 59
 — v. Tremamondo, 445
 Goodfellow, Banks v., 14
 — v. Burchett, 626
 — v. Goodfellow, 248
 Goodhew, Davies v., 210
 Goodier v. Edmunds, 209, 480
 — v. Johnson, 479, 482
 Goodings v. Goodings, 271, 302
 Goodlad v. Barnett, 111
 Goodlake, Wood v., 52
 Goodman's Trusts, *In re*, 239
 Goodman v. Edwards, 182
 — v. Goodman (2 Lee, 109), 58
 — v. Goodman (1 De G. & S.
 695), 537
 Goodright v. Jones, 523
 — d. Revell v. Parker, 416
 — v. White, 277
 Goodtitle d. Bailey v. Pugh, 277
 — v. Billington, 520
 — d. Daniel v. Miles, 180
 — d. Hayward v. Whithy, 360,
 454
 — d. Radford v. Southern, 108
 — d. Sweet v. Herring, 352
 Goodwin's Trust, *In re*, 246
 Goodwin v. Lee, 136
 Goodwyn, Matheson v., 270, 448,
 546
 Goodyar, *In bonis*, 187
 Goodyer, Charge v., 266
 Gould v. Teague, 132, 162, 216
 Goulden, Smallman v., 116
 Goose, Holdsworth v., 368
 Gorbail v. Davison, 232, 236
 Gord v. Needs, 223, 224
 Gordon, *In bonis*, 23
 — v. Adolphus, 450, 457
 — v. Anderson, 123
 — v. Atkinson, 330
 — Bowchier v., 256
 — v. Bowden, 416
 — Coote v., 88
 — v. Duff, 115
 — Forbes v., 53
 — v. Gordon (1 Mer. 142), 245
 — v. Gordon (L. R. 5 H. L. 254),
 525
 — Greene v., 198
 — Norcutt v., 660
 — v. Lord Reay, 63
 — v. Whieldon, 230
 — v. Woodford, 424
 Gore v. Langton, 172
 Gorges v. Webb, 610
 Gorst v. Lowndes, 490
 Gorsuch, Rowland v., 270
 Gorton, Dowse v., 377, 384
 Gorvin, Williams v., 397
 Gosden v. Dotterill, 156, 158
 Goslett, Bower v., 519
 Gosling, *In bonis*, 36
 — v. Carter, 374
 — Christie v., 485, 593, 597, 599
 — v. Gosling, 493, 507
 — v. Townshend, 533, 534

- Gosman, *In re*, 650
 Gosage v. Taylor, 348
 Gossett, Daniell v., 557
 Gotch v. Foster, 151, 461
 Gott, Allan v., 677
 — Heptinstall v., 645
 Goudge, Lane v., 464, 467
 Gough v. Bult, 405, 406, 623
 — v. Davies, 99
 — v. Findon, 10
 Goulbourne, Nightingale v., 295
 Gould v. Gould, 649
 — v. Kemp, 331
 — Knight v., 645
 — v. Lakes, 32
 Gouldbury, Guddbury, v., 162
 Goulder v. Camm, 518, 516
 — v. Goulder, 8
 Goulstone, Woodward v., 47
 Gover v. Davis, 187
 Governors of Christ's Hospital, Com-
 pany of Pewterers v., 476
 — of London Hospital, Robinson
 v., 211, 321
 — of Queen Anne's Bounty,
 Jackson v., 316
 — of St. George's Hospital, Phil-
 pott v., 320
 Gow v. Foster, 441
 Gowan, *In re*; Gowan v. Gowan, 600
 — v. Broughton, 657, 659
 — v. Gowan, 600
 — v. Wyatt, 458
 Gowdey, Fourdrin v., 630, 676
 Gower v. Eyre, 426
 — v. Grovenor, 592
 — Jenkins v., 283
 Gowland, Langford v., 304
 Gowling v. Thompson (19 L. T. N. S.
 242), 254
 — v. Thompson (11 Eq. 366), 544
 Grace, Falkner v., 677
 — Webb v., 451
 Grady, Harding v., 671
 Graftey v. Humpage, 291
 Grafton v. Frith, 318
 Graham, *In bonis*, 41, 80
 — Comber v., 395
 — Curtis v., 325
 — Hanson v., 463, 464
 — v. Lee, 507
 — v. Paternoster, 317
 — Pearce v., 642
 — Pomfret v., 552
 — Pownall v., 485
 — Taylor v., 471
 — Windham v., 236
 Grainger, Christ's Hospital v., 476
 — Slingsby v., 108, 109, 161
 Grange, Hill v., 172
 — v. Sturdy, 239, 244
 Granger, Kendall v., 298, 306
 Grant, *In re*; Walker v. Martineau,
 412
 — Barlow v., 405
 Grant, Barnes v., 400, 402
 — v. Bridger, 614
 — v. Dyer, 496, 573
 — v. Grant, 221, 225
 — v. Heysham, 472
 — Hill v., 149, 385
 — Hodges v., 118, 167, 334
 — v. Lynam, 271, 275
 — Stoddart v., 42
 — Thompson v., 186
 — v. Wimbolt, 421
 Grantham v. Hawley, 431
 Granville v. Beaufort, 654
 Grassett, Hollingsworth v., 292
 Gratrix v. Chambers, 412
 Grattan v. Langdale, 287, 579
 Gratwicke's Trusts (L. R. 1 Eq. 177),
 207
 Gratwicke, *Re* (35 B. 315), 471
 Gravener v. Hallum, 213
 — v. Watkins, 341, 419, 618
 Graves' Minors, *In re*, 217
 Graves, *Ex parte*; *In re* Harris, 20
 — v. Dolphin, 422
 — v. Graves, 671
 — v. Hicks, 409, 598
 — Palmer v., 671
 — v. Waters, 612, 613
 — v. Weld, 431
 Gray, *In bonis*, 81
 — *In re*; Dresser v. Gray, 112,
 113
 — Bateman v., 258, 264
 — Butler v., 207, 397, 610
 — Dresser v., 112, 113
 — v. Garman, 544
 — v. Golding, 524
 — v. Gray, 500, 501
 — v. Earl of Limerick, 236
 — v. Minnethorpe, 678
 — Robinson v., 340
 — v. Siggers, 444
 Grayburn v. Clarkson, 377
 Graydon v. Hicks, 495, 502
 Grayson, *In re*, 286
 — v. Atkinson (2 Ves. Sen. 459),
 24
 — v. Atkinson (1 Wils. 333),
 178
 Greated v. Greated, 141, 506, 529,
 573
 Greathed, Doe d. Harris v., 103
 Greater, *In bonis*, 26
 Greatrex, Adney v., 266
 Great Western Railway Co., Sturge
 v., 288
 Greaves' Settlement, *In re*, 203
 — v. Simpson, 353
 Green's Estate, *Re*, 528
 Green, *In re*; Baldock v. Green, 119,
 491, 674
 — *In re*; Walsh v. Green, 180
 — Baldock v., 119, 491, 674
 — v. Barrow, 531

- Green v. Britten (42 L. J. Ch. 187), 88, 320
 — v. Britten (1 D. J. & S. 649), 446, 513
 — Bund v., 649
 — v. Burgess, 656
 — Carter v., 320
 — Doe d. Littlewood v., 329
 — v. Dunn, 193
 — v. Ekina, 146
 — v. Gascoyne, 494
 — r. Giles, 167, 577
 — v. Green, 577
 — v. Harvey, 573
 — Haslewood v., 120
 — Humphreys v., 13
 — v. Jackson, 212
 — Jones v., 127
 — Lane v., 250
 — v. Marsden, 399, 400, 514
 — v. Pertwee, 194
 — Piggott v., 292
 — v. Skipworth, 53
 — v. Spicer, 407
 — Stewart v., 297
 — Symes v., 14
 — v. Symonds, 130, 165
 — v. Tribe (9 Ch. D. 231), 43, 59
 — v. Tribe (27 W. R. 39), 146, 615, 647
 — Walsh v., 180
 Greenbank, Hearle v., 96, 152, 512
 Greene v. Flood, 606, 647
 — v. Gordon, 193
 — v. Greene (I. R. 3 Eq. 90, 629), 400
 — v. Greene (4 Madd. 148), 678
 — v. Ward, 608
 Greener, Mannox v., 172, 340, 670
 Greenfield, Golds v., 640
 Greenhalgh v. Bates, 562
 Greenhill, A.-G. v., 505
 — v. North British & Mercantile Insurance Co., 90
 — Smith v., 594
 Greenhough, Barraclough v., 71
 Greening, Doe d. Browne v., 102
 — Stone v., 108, 170
 Greenway v. Greenway, 209, 343, 577
 Greenwell v. Davison, 176, 183
 Greenwich Hospital Improvement Act, *Re*, 176
 Greenwood's Trusts, *In re*, 283
 Greenwood, *In bonis*, 39, 62
 — *In re*; Greenwood v. Greenwood, 660
 — Acason v., 515
 — Barker v., 358
 — v. Evans, 437, 438
 — v. Greenwood (5 Ch. D. 954), 621
 — v. Greenwood ([1892] 2 Ch. 295), 660
 — v. Perry, 550
 Greenwood v. Roberts, 483
 — v. Rothwell, 356
 — v. Verdon, 576, 584
 Greese, Richardson v., 631
 Greet v. Greet, 464
 Greetham v. Colton, 670
 Gregg v. Coates, 430
 Gregor, Fortescue v., 637
 Gregory's Will, 220, 226
 Gregory, Alt v., 254, 422
 — Aston v., 151
 — Badger v., 551
 — D'Eyncourt v. (3 Eq. 382), 431
 — D'Eyncourt v. (1 Ch. D. 441), 503
 — D'Eyncourt v. (34 B. 36), 590, 647
 — v. Edmondson, 398, 401
 — Gann v., 32, 33
 — v. Henderson, 359
 — v. Queen's Proctor, 25, 31
 — v. Smith, 274, 275
 — Wildbore v., 204
 Gregson's Trusts, *Re* (12 W. R. 935), 222
 — Trust Estate, *In re* (2 D. J. & S. 428), 554
 Gregson, Clayton v., 101
 Greig v. Martin, 222
 Grenfell, Paget v., 627
 Gresham, Clayton v., 441
 — Duddy v., 451, 499, 500, 502
 — Wharton v., 347
 Grealey v. Mousley, 75
 Gretton v. Haward, 350
 Greville v. Browne, 659, 673, 677
 — v. Tylee, 33
 Grew, Roe d. Dodson v., 355
 Grey's Settlements, *In re*; Acason v. Greenwood, 515
 — Trusts, *In re*; Grey v. Stamford, 239
 Grey v. Pearson, 570, 571, 573
 — Pickersgill v., 521
 — v. Stamford, 239
 — Ward v., 168, 169, 326
 Grice, Finney v., 164
 — v. Funnell, 616
 Grier, *In re*, 601, 602
 Grieve, Benyon v., 125, 228
 — v. Grieve, 346
 Grieves v. Rawley, 265
 Grieveson v. Kirsopp, 262
 Griffin, Thompson v., 385
 Griffith, *In bonis*, 41
 — *In re*; Carr v. Griffith, 145
 — v. Blunt, 460
 — v. Bourke, 624
 — Carr v., 145
 — v. Pownall, 483
 — v. Pruen, 294
 — v. Rogers, 654
 Griffiths, Bean v., 497
 — Dansey v., 337
 — v. Evan, 273, 355, 400

Griffiths v. Gale, 642
 — v. Griffiths, 30
 — v. Hamilton, 652, 654
 — v. Jones, 302
 — Morris v., 210
 — v. Mortimer, 558
 — v. Vere, 491
 Grimshaw's Trusts, *In re*, 465, 467
 Grimshaw v. Pickup, 573
 Grimson v. Downing, 350
 Grimwood, Harrison v., 466, 467, 468
 Grindell, Machin v., 52
 Grindle, Blaiklock v., 96
 Grindley, Tavernor v., 237, 648
 Grissell v. Swinhoe, 90
 Grogan, McCormick v., 66
 Gronow, Morgan v., 486
 Groom v. Thomas, 14
 Groombridge, Browne v., 128, 248, 656, 665
 Grosvenor v. Durston, 75, 92, 159
 — Gower v., 592
 Grote, A.-G. v., 115
 Grove's Trusts, *Re* (1 Giff. 74), 414
 — *Re* (3 Giff. 575), 469
 — *In re*; Vaucher v. Solicitor to Treasury, 7, 239
 — Edwards v., 387
 — Gullan v., 46
 — Hillersden v., 294
 — May v., 161
 — Young v., 324, 450
 Grover, Francis v., 33
 — -Wright, Layborn v., 169
 Groves, Broadbent v., 139, 218
 — v. Musther, 544
 — Shailer v., 251, 557
 — v. Wright, 518
 Grute v. Locroft, 335
 Gryll's Trust, *Re*, 235, 288, 291, 588
 Guardhouse v. Blackburn, 22, 23
 Gude v. Mumford, 156
 — v. Worthington, 406
 Gue, *In re*; Smith v. Gue, 231
 Guedella, Montefiore v., 632
 Guest v. Bennett, 163
 — v. Willasey, 62, 63
 Guillemard, Rickett v., 559
 Gullan, *In bonis*, 45, 46
 — v. Grove, 46
 — Stevenson v., 254, 554, 555
 Gulliford, Parsons v., 544
 Gulliver v. Vaux, 506
 — v. Wickett, 527
 Gully v. Gregoe, 403
 — v. Davis, 176, 182
 Gummos v. Howes, 352, 557
 Gundry v. Pinniger, 282, 289
 Gunn, *In bonis*, 68
 Gunning's Estate, *In re*, 467
 Gunstan, *In bonis*; Blake v. Blake, 28
 Gurner, Harman v., 104
 Gurney v. Gurney, 100
 — Hemming v., 124;

Guthrie v. Walrond, 88, 146, 166
 Gutteridge, Phillips v., 417
 Guy, Hampson v., 22
 — v. Sharp, 123
 Gwillim v. Gwillim, 28
 Gwynne v. Berry, 337, 583
 Gyett v. Williams, 661, 673

HABERGHAM v. Ridehalgh, 248, 541, 544
 — v. Vincent, 11, 64
 Hackman, Rochford v., 147, 422, 507
 Hacon, Eames v., 3, 80
 Haddelsey v. Adams, 361, 549
 Hadden, Farquhar v., 135
 Hadow v. Hadow, 404
 Hadwen v. Hadwen, 598
 Hagen's Trusts, *In re*, 554
 Haggard v. Haggard, 617
 Hagger v. Payne, 256, 257
 Haig v. Swiney, 394
 Hake, King v., 472
 Haldane v. Eckford, 4
 Hale v. Beck, 607
 — v. Cox, 679
 — Cranley v., 653
 — v. Hale, 484
 — Maddy v., 438
 — v. Pew, 479, 489
 — Phipps v., 30
 — Stevens v., 605
 — v. Tokelove, 43, 59
 — Webster v., 118, 150
 Hales, Bridges v., 84
 — v. Darell, 630
 — v. Margerum, 395
 — Stummvoll v., 249
 — Synge v., 333
 Haley v. Bannister (23 B. 336), 126
 — v. Bannister (4 Madd. 275), 491
 Halfhead v. Shepherd, 610
 Halford v. Close, 490
 — Hodgson v., 481, 486, 497, 499
 — v. Stains, 492, 494
 Hall's Will, *Re*, 518
 — Charity, *Re*, 307
 Hall, *In bonis*, 33
 — *In re*; Branston v. Weightman, 244
 — *Re*; Hall v. Hall, 673
 — v. A.-G. (2 Jarm. 980), 302
 — A.-G. v. (9 Ha. 647), 318
 — Baker v., 646
 — Cuff v., 365
 — Dalrymple v., 231, 569
 — v. Dewes, 368
 — Edwards v., 314, 317, 318, 319
 — v. Fennell, 382
 — v. Fisher, 108, 109, 170
 — v. Hall (1 P. & D. 481), 22

- Hall v. Hall ([1892] 1 Ch. 361), 177
 — v. Hall (51 L. T. 86), 673
 — v. Hewer, 235
 — v. Hill, 95, 122, 628
 — Horton v., 416
 — v. Leitch, 618
 — Line v., 487
 — Margetson v., 547
 — v. May, 78
 — Price v., 261, 455, 521
 — v. Robertson, 231
 — v. Severne, 195
 — v. Warren, 14
 — v. Waterhouse, 17
 — Wheate v., 370
 — v. Woolley, 543
 Hallett, Doe v., 247
 — Hewett v., 331
 — to Martin, 380
 Halley, Doe d. Bean v., 603
 Hallifax v. Wilson, 566
 Halliley, Stammers v., 661
 Halliwell, *In bonis*, 43
 — v. Tanner, 663
 Hallows v. Holmes, 515
 Hallum, Gravenor v., 213
 Hallyburton, *In bonis*, 1
 Halpin, *In bonis*, 10
 Halsey, Peck v., 623
 Halton, Curtis v., 320
 — v. Foster, 281
 Haly's Trusts, *In re*, 402, 404
 Ham's Trusts, *In re*, 289, 659
 Hambleton, *In re*; Hambleton v. Hambleton, 575
 Hambro v. Hambro, 409
 Hamerton, Hawkins v., 552
 Hamilton, *In bonis*, 81
 — *In re*, 387, 403
 — v. Buckmaster, 175, 176
 — v. Dallas (38 L. T. 215), 4, 154
 — v. Dallas (1 Ch. D. 257), 7
 — v. Foote, 215
 — Frewen v., 415
 — Griffiths v., 652, 654
 — v. Hamilton, 97, 516
 — Mayor of, v. Hodsdon, 175
 — Jackson v., 623, 663
 — Johnstone v., 650, 652
 — v. Mills, 279
 — Robson v., 166, 191
 — v. West, 351, 352, 355
 Hamlet, *In re*; Stephen v. Cunningham, 469, 574
 Hammersly, Eisdale v., 368
 Hammond, *In bonis*, 28
 — Browne v., 457, 642
 — Cloak v., 222, 267
 — Edwards v., 454
 — Hutcheson v., 212, 213, 501, 638
 — Joslin v., 530
 — Kelly v., 241
 Hammond v. Nearne, 404
 Hampshire v. Peirce, 250
 Hampson v. Guy, 22
 — Thackeray v., 536, 573
 Hampton v. Holman, 480, 487, 488
 Hanan v. Drew, 580
 Hanbury, Baker v., 641, 643
 — Davenport v., 267
 — Giraud v., 653
 — v. Hanbury, 626
 — Scott v., 201
 — v. Spooner, 292
 Hanby v. Roberts, 667
 Hance v. Truwhitt, 95
 Hancock, Cookson v., 126
 — Jones d. Henry v., 623
 Hancox v. Abbey, 136, 676, 679
 Hand v. North, 332
 Handcock's Trusts, *In re*, 92
 Handley, Dean v., 533
 — Wade Gery v., 146, 490, 647
 Hane, Hastings v., 160
 Hankey, Tatnall v., 1
 Hankins' Trust, 292
 Hanlon, Going v., 340
 — Whitten v., 413
 Hanna v. Bell, 248
 Hannaford v. Hannaford, 610
 Hannah v. Duke, 554
 Hannam, Ryall v., 222
 — v. Simms, 542
 Hanning, Trent v., 357
 Hannington v. True, 142
 Hannyngton, Garner v., 439
 Hanrott, Wombwell v., 637
 Hansard, Yockney v., 122
 — v. Graham, 463, 464
 Harben, Godfrey v., 664
 Harbin v. Darley, 389
 — v. Masterman, 493, 507
 — Stocker v., 54, 676
 — Tytherleigh v., 542
 Harcourt, Ainalie v., 437, 438
 — v. Morgan, 110
 — v. White, 428
 Hardacre v. Nash, 167
 Hardaker v. Moorhouse, 368
 — Stead v., 657, 668
 Hardcastle v. Dennison, 341
 — Forbes v., 314
 — v. Hardcastle, 464
 Harden, Beckett v., 54, 616
 Harding, Barry v., 134, 162
 — Campbell v., 581
 — v. Glyn, 271, 273, 401, 403
 — v. Grady, 671
 — v. Harding, 140
 — Jones v., 46
 Hardisty v. Wells, 91, 208, 644
 Hardman v. Maffett, 286
 — Upton v., 577
 Hardwick v. Hardwick, 108
 — Ring v., 487
 — v. Thurston, 640
 — Walker v., 676

- Hardwick, Earl of, *v.* Douglas, 618
 Hardy, *In re*; Wells *v.* Barwick, 660, 661
 — Lockhart *v.*, 405, 676
 Hare *v.* Hare, 595
 — *v.* Pryce, 191
 — *v.* Westropp, 420, 618
 Harewood, Earl of, Taylor *v.*, 588
 Harford *v.* Browning, 293
 — Davis *v.*, 380
 — Miles *v.*, 482, 599
 Hargreaves, *In re*; Midgley *v.* Tatley, 480
 — *v.* Pennington, 126, 615
 Harkness, D'Huart *v.*, 2
 Harland *v.* Trigg, 400
 Harley, A.-G. *v.* (4 Madd. 263), 124
 — A.-G. *v.* (5 Madd. 321), 312, 313
 — *v.* Moon, 120
 Harloe *v.* Harloe, 665
 Harman, *In re*; Lloyd *v.* Tardy, 203
 — *v.* Dickenson, 551
 — *v.* Gurner, 104
 — Hope *v.*, 10
 — Lugar *v.*, 249, 390
 — Offen *v.*, 379
 Harmony, The, 6
 Harmood *v.* Oglander, 657
 Harnett *v.* Yielding, 435
 Harper *v.* Munday, 136, 674
 — Stringer *v.*, 143, 664, 665
 Harpley, Rymer *v.*, 261, 359
 Harpur, Hedges *v.* (9 B. 479), 269
 — Hedges *v.* (3 De G. & J. 129), 414, 575, 584
 Harries' Trust, *In re*, 121, 191
 Harrington's Trusts, *Re*, 19, 99
 Harrington, Countess of, *v.* Atherton, 443, 448
 — *v.* Harrington, 485, 598, 594
 Harris' Trust, *Re*, 232, 234
 Harris, *In bonis* (1 Sw. & T. 536), 39
 — *In bonis* (3 Sw. & T. 485), 45
 — *In bonis* (2 P. & D. 83), 70
 — *In re*; *Ex parte* Graves, 20
 — *In re*; Jackson *v.* Governors of Queen Anne's Bounty, 316
 — Amson *v.*, 251
 — Ball *v.*, 373, 671
 — *v.* Bedford, 53
 — *v.* Berrall, 36
 — Bird *v.*, 401, 450
 — Cave *v.*, 103
 — *v.* Davis, 194, 337, 343, 519, 577
 — Dillon *v.*, 571
 — Doe *v.*, 44
 — Doe d. Chidzey *v.*, 324
 — *v.* Du Pasquier, 607
 — Evans *v.*, 258
 — *v.* Finch, 149
 — *v.* Greathed, 103
 Harris *v.* Harris (1 R. 3 Eq. 610), 193, 613
 — *v.* Harris (29 B. 107), 378, 379
 — *v.* Harris (32 B. 333), 438
 — *v.* Harris (11 Ch. D. 663), 545
 — *v.* Knight, 69
 — *v.* Lloyd, 238, 255, 257
 — Mander *v.*, 230
 — Miller *v.*, 84
 — *v.* Newton, 281, 397
 — *v.* Poyner, 430, 445
 — Smith *v.*, 25
 — *v.* Taylor, 578
 — Thompson *v.*, 665
 — *v.* Watkins, 672
 — Whitehorn *v.*, 271
 Harrison's Estate, *In re* (3 L. R. Ir. 114), 269
 — Estate, *In re* (5 Ch. 408), 340, 607
 — Trusts, *In re*; Harrison *v.* Harrison, 427
 Harrison, *In bonis*, 28
 — *Re* (3 Anst. 836), 330
 — *In re*; Harrison *v.* Higson, 242
 — *In re*; Townson *v.* Harrison, 433
 — *In re*; Turner *v.* Hallard, 102, 222
 — *v.* Asher, 127
 — *v.* Barney, 434
 — Bide *v.*, 161
 — Buchanan *v.*, 276
 — Caldecott *v.*, 266
 — Cockayne *v.*, 518
 — Cowman *v.*, 399
 — *v.* Elvin, 31
 — *v.* Foreman, 526
 — Gent *v.*, 427, 429
 — *v.* Grimwood, 466, 467, 468
 — *v.* Harrison (1 Kea. 765), 95
 — *v.* Harrison (1 R. 10 Eq. 290), 247
 — *v.* Harrison (1 R. & M. 72), 249, 312, 313
 — *v.* Harrison (28 B. 21), 287
 — *v.* Harrison (28 Ch. D. 220), 427
 — *v.* Harrison (2 H. & M. 237), 651
 — *v.* Harrison (8 Ch. 342), 664
 — Havergal *v.*, 645
 — *v.* Higson, 242
 — *v.* Jackson, 118, 123
 — Miles *v.*, 665, 668
 — *v.* Naylor, 598
 — Richardson *v.*, 348, 360, 610
 — *v.* Round, 589
 — *v.* Rowley, 292
 — Stone *v.*, 148
 — Townson *v.*, 433
 Harrowby, Lord, Johnson *v.*, 126
 Harstonge, Cowley *v.*, 211

- Hart's Estate, *In re*; Orford v. Hart, 358
 — Trusts, 459, 464, 499
 Hart, *In re*; Hart v. Hernandez, 159
 — Chapman v., 180, 158, 165
 — Coates v., 570, 612
 — v. Durand, 240
 — v. Hernandez, 159
 — v. Manston, 617
 — v. Middlehurst, 601
 — Orford v., 358
 — v. Tribe, 404
 — v. Tulk, 620
 Hartcup, Glover v., 631
 Harter v. Harter, 23
 — Moss v., 199
 Hartford v. Power, 513
 Hartland v. Murrell, 671, 672
 Hartley's Trusts, *In re*, 228
 Hartley, *In bonis*, 41
 — *In re*; Stedman v. Dunster, 497
 — v. Hurle, 182, 678
 — Mortimer v., 284, 578
 — v. Tribber, 240
 Hartnoll, Blight v., 76, 194, 200, 413, 482, 524
 Harton v. Harton, 358, 362
 Hartopp v. Hartopp, 632
 Hartshorne v. Nicholson, 318
 Harvey's Estate, *In re*; Godfrey v. Harben, 664
 — Estate, *In re*; Harvey v. Gil-
 low, 642
 Harvey, *In re*; Peek v. Savory, 482
 — *Re*; *Ex parte* Pixley v.
 Harvey, 507
 — Doe d. Bosnall v., 350
 — v. Farnie, 5
 — v. Gillow, 642
 — Green v., 573
 — v. Harvey (23 W. R. 476), 42,
 204
 — v. Harvey (2 P. W. 21), 152
 — v. Harvey (32 B. 441), 166
 — v. Harvey (5 B. 134), 446
 — v. Harvey (3 Jur. 949), 472
 — v. Palmer, 132
 — Pixley v., 507
 — Pratt v., 317
 — Quain v., 670
 — v. Stracey, 207, 256, 644
 — v. Towell, 393
 Harwood v. Baker, 14
 — Scott v., 260
 Haseldine, *In re*; Grange v. Sturdy,
 239, 244
 Haselfoot, Paske v., 76, 639
 Hasker v. Sutton, 572
 Haskett Smith's Trusts, *In re*, 546
 Haslam, O'Connor v., 669
 Haslewood, Doe d. Blakiston v.,
 248
 — Doe d. Hickman v., 178
 Haslewood v. Green, 120
 — v. Pope, 658
 Hasluck v. Pedley, 144
 Hassel v. Hassel, 673
 Hassell v. Hawkins, 631
 Hassels, Ledward v., 503
 Hastie's Trusts, *In re*, 245, 246
 Hastilow v. Stobie, 21
 Hastings v. Hane, 160
 Haswell v. Haswell, 423
 Hatchell, Morgan v., 83
 Hatfield v. Minet, 632
 Hathorn v. Foster, 523
 Hattatt v. Hattatt, 12, 53
 Hatterly v. Jackson, 326
 Hattersley, Finch v., 672
 Hatton, *In bonis*, 29
 — v. Finch, 421
 — Gardner v., 116, 129
 — Hooley v., 122, 123
 — v. May, 411
 Haughton v. Haughton, 499
 Havelock v. Havelock; *In re* Allan,
 386
 Haverfield, Golding v., 629
 Havergal v. Harrison, 645
 Havers, Smith v., 415
 Havery v. Curtis, 459
 Haviland, Nichols v., 282, 640
 Haw v. Earles, 177
 Haward, Gretton v., 350
 Hawe, Attree v., 315, 316
 Hawes, Cole v., 400
 — v. Hawes (14 Ch. D. 614), 249
 — v. Hawes (1 Ves. Sen. 13),
 620
 Hawkes v. Hawkes, 33
 — v. Hubbuck, 516
 — Nicholls v., 412
 Hawkins' Trust, 317
 Hawkins, *Ex parte*, 216
 — v. Allen, 317
 — v. Combe, 147
 — Fenton v., 401, 647
 — Gallard v., 650
 — v. Hamerton, 552
 — Hassell v., 631
 — v. Hawkins, 134, 649, 669
 — Higginbotham v., 427
 — Jones v., 86
 Hawks v. Longridge, 193
 Hawksley v. Barrow, 16
 Hawsworth v. Hawsworth (6 Ch.
 539), 85
 — v. Hawsworth (27 B. 1), 175,
 620
 Hawley v. Cutts, 110
 — Grantham v., 431
 — Thornton v., 210
 Hawthorn v. Sheddin, 199, 668
 Hay, Buckton v., 477
 — v. Earl of Coventry, 578
 — Lilley v., 303
 Hayden, Coogan v., 275
 — Ewer v., 170

- Hayden, Smithwick v., 232, 623
 — v. Willshire, 268
 Haydon v. Wood, 372
 Hayes' Will, *Re*, 534
 Hayes, *In bonis*, 51
 — Dale v., 441
 — d. Foorde v. Foorde, 347, 348, 349
 — Foster v., 579
 — v. Hayes, 480
 — v. Oatley, 202
 — Watson v., 401, 465
 Haygarth, Taylor v., 650, 652
 Hayne's Trusts, *Re*, 533
 Hayne, Clarke v., 288
 — Power v., 411
 Haynes, *In re*; Kemp v. Haynes, 503
 — v. Haynes (3 D. M. & G. 590), 156, 416, 661
 — v. Haynes (1 Dr. & Sm. 426), 216
 — v. Hill, 63
 — Kemp v., 503
 — Martin v., 409, 410
 — v. Mico, 630
 Hayter v. Trego, 304, 305
 — v. Tucker, 314
 Haythorne, Williams v., 460, 461, 470
 Hayton's Trusts, *Re*, 608
 Hayward, *In re*; Creery v. Lingwood, 533, 535
 — v. James, 565, 566
 — Lord v., 247
 — Page v., 460
 — v. Pile, 439
 — v. Whitby, 454
 Hazelton, Magness v., 45
 Heach v. Prichard, 171
 Head's Trustees and Macdonald, *In re*, 671
 Head v. Randall, 269, 333
 — v. Godlee, 214
 Headfort, Marquis of, Vaughan v., 326
 Healy v. Donnery, 610
 — v. Healy, 224
 Heap, Schofield v., 632
 Heape, Sabin v., 373
 Heardson v. Williamson, 362
 Hearing, Webb v., 337, 456
 Hearle v. Greenbank, 96, 152, 512
 Hearn v. Allen, 172
 — v. Baker, 544, 549
 — Dawson v., 411
 Hearne v. Wigginton, 187
 Heasman v. Pearce, 268, 334, 472, 473, 478, 543, 546
 Heath, *In bonis*, 33
 — v. Chapman, 300
 — v. Dendy, 660
 — v. Lewis, 451, 499
 — v. Nugent, 660
 — Oke v., 191, 641
 — v. Perry, 151
 Heath v. Samson, 7
 — v. Weston, 168
 — v. Wickham, 514
 Heathcote, *In bonis*, 62
 Heaven, Banks v., 147, 148
 Heddou, Whitelock v., 267, 278
 Hedges' Trust Estate, *In re*, 635
 Hedges v. Harpur, 269, 414, 575, 584
 Hedgman, *In re*; Morley v. Croxon, 318
 Hedley's Trusts, *In re*, 607
 Hegarty v. King, 22
 Heginbotham, *In re*; Wilson v. Heginbotham, 175, 520
 Heiron, Carveth v., 285
 Helby v. Dear, 256, 458
 Hellard, Turner v., 102, 222
 Hellicar, Powell v., 10
 Hellier, Evans v., 492, 494
 — v. Hellier, 41
 Helliwell, Pearson v., 416
 Hellyar, Burt v., 274, 540, 545
 Helsington, Waase v., 672
 Helyar v. Helyar, 56
 — Trethewy v., 292, 657, 663
 Hember, Parfitt v., 487, 488
 Heming, Serocold v., 60
 Hemingway, *In re*; James v. Dawson, 575
 Hemming v. Gurney, 124
 — v. Neil, 407, 408
 Henderson, *Re*, 290
 — v. Constable, 606
 — v. Cross, 505, 519
 — Gregory v., 359
 — v. Kennicott, 563
 — Lawlor v., 271
 — Tuckey v., 123
 — Vaux v., 280, 288
 Hendry, *Re*; Watson v. Blakeney, 323
 Heneage v. Lord Andover, 674
 — Doe v., 590
 — Meredith v., 400
 Henfrey v. Henfrey, 41
 Hengler, *In re*; Frowde v. Hengler, 448
 Henley, Bartholomew v., 11
 — Jones v., 227
 — Lord, Noel v., 678
 Hennessey v. Bray, 336
 Henniker, Wythe v., 659, 667
 Hennis, Farr v., 404
 Henrion v. Bonham, 297, 415
 Henry the 6th, *In bonis* Prince, 70
 Henry, Clark v., 532, 533, 535
 — v. Hancock, 623
 — v. Henry, 92, 93, 676
 — Oppenheim v., 257
 — v. Strong, 407, 408
 Henshaw, *Re*, 294
 — v. Atkinson, 320
 — Cope v., 225

- Hensler, *In re*; Jones v. Hensler, 642
 Hensman v. Fryer, 117, 659, 662, 667
 — Williams v., 331
 Henton, *In re*; Henton v. Henton, 166
 Henty v. Wrey, 459
 Henvell v. Whitaker, 672
 Hepburn, Fisher v., 187
 — v. Skirving, 106
 — Slevin v., 304, 305
 Heptinstall v. Gott, 646
 Hepworth v. Hill, 189
 — v. Taylor, 571
 Herbert's Trusts, 240
 Herbert v. Herbert, 51
 — Jerningham v., 623
 — Le Bas v., 658, 663
 — Pengelley v., 199
 — v. Reid, 228
 — Sinnett v., 306, 319, 323
 — v. Thomas, 395
 — Twist v., 552
 — v. Webster, 483
 Herdman's Trust, *In re*, 197, 204
 Hereford, Bishop of, v. Adams, 301
 — v. Ravenhill, 211, 214
 — Lady, Tracy v., 433
 Hernandez, Hart v., 159
 Hernando, *In re*; Hernando v. Sawtell, 4, 199
 Herne, *In bonis*, 53, 54
 — Reeves v., 501
 Heron, Poole v., 118
 — Stokes v., 413
 Herrick v. Franklin, 392
 — White v., 516
 — Woodhouse v., 355
 Herring v. Barrow, 77, 396, 520
 — Goodtitle d. Sweet v., 352
 — Howes v., 540
 Hertford, Marquis of, Croker v., 62
 — v. Lord, De Zichy Ferraris v., 3
 — Lord, Countess Ferraris v., 63, 64
 — Marquis of, v. Lowther, 165, 187
 — Marquis of, Lord Southampton v., 479
 Hervey v. M'Laughlin, 530
 Hervey-Bathurst v. Stanley, 233, 235
 Heseltine v. Heseltine, 130
 Hetherington, Davies v., 621
 — v. Longridge, 195
 — v. Oakman, 472
 Hewer, Hall v., 235
 Hewetson, Paul v., 76
 — v. Todhunter, 290
 Hewett, *In re*; Hewett v. Hallett, 331
 — v. Snare, 656
 Hewit, *In re*; Lawson v. Duncan, 664
 Hewitt's Estate, *In re*; Mayor of Gateshead v. Hudspeth, 298, 299, 306
 Hewitt, Craignish v., 4, 8
 — Eaton v., 457
 — v. Jardine, 633
 Heyhoe, Scales v., 215
 Heysham, Grant v., 472
 Heywood, Allwood v., 439
 — v. Heywood, 569
 Hibbert v. Cooke, 432
 — Garvey v., 249
 — v. Hibbert (3 Mer. 687), 86
 — v. Hibbert (15 Eq. 372), 271
 Hibblethwait v. Cartwright, 247
 Higon v. Higon, 171
 Hiccocks, Atkins v., 463
 Hichens v. Hichens, 662
 Hickle, Bryant v., 385
 Hickling v. Boyer, 134, 430
 Hickman v. Haslewood, 178
 — v. Upsall, 416
 Hicks, Doe d. Compere v., 361, 598
 — Graves v., 409, 598
 — Graydon v., 495, 502
 — v. Ross, 413
 — v. Sallitt, 169
 Hide, Meade v., 676
 — Mosley v., 365
 Hiddings, Heirs v. De Villiers Denys sen, 377
 Higginbotham v. Hawkins, 427
 Higgins, Coventry v., 152
 — Doody v., 280, 281
 Higginson v. Barneby, 601, 602
 Higgs, Brown v., 273, 609
 Higham v. Baker, 109
 Hight, White v., 575
 Highton, Whitby v., 16
 Higson, Harrison v., 242
 Hilhouse, Thorman v., 673
 Hill's Trusts, *In re*, 314, 533
 Hill, *In bonis* (1 Rob. 276), 51
 — *In bonis* (2 P. & D. 89), 70
 — *In re*; Hill v. Hill, 447
 — Ayrey v., 15
 — v. Brown, 338
 — v. Browne, 436
 — to Chapman, *In re*, 558, 559
 — v. Chapman, 255, 256
 — Chinery v., 544
 — v. Crook (L. R. 6 H. L. 265, 241, 242, 244)
 — Crook v. (3 Ch. D. 773), 245, 246
 — Dalton v., 470
 — v. Grange, 172
 — v. Grant, 149, 385
 — Hall v., 95, 122, 638
 — Haynes v., 63
 — Hepworth v., 139
 — v. Hill (11 Jur. N. S. 806), 119
 — v. Hill (50 L. J. Ch. 551), 447

- Hill v. Hill (6 Sim. 136), 602
 — Hull v., 164
 — Johnston v., 477
 — v. Jones (37 L. J. Ch. 465), 126
 — v. Jones (2 W. R. 657), 318
 — Lacey v., 94, 181
 — v. Bishop of London, 136
 — Marshall v., 574
 — Merry v., 462, 465
 — v. Mill (12 Ir. Eq. 107), 436
 — Mill v. (3 H. L. 828), 436
 — v. Potts, 413
 — v. Schwarz, 13, 664
 — v. Rattey, 340
 — Rose d. Vere v., 336, 556
 — White v., 574
 — Wolf v., 424
 — v. Wormsley, 138
 Hillas v. Hillas, 167
 Hillersden v. Grove, 294
 Hilliard, Clowes v., 287
 — v. Fulford, 469
 Hilla, Palin v., 292
 — v. Wirley, 641
 Hillyar, Bolitho v., 530, 547
 Hilton, Clarke v., 401, 647
 — Garbut v., 501
 — v. Hilton, 636
 Hinchcliffe v. Hinchcliffe (2 Dr. & S. 96), 124
 — v. Hinchcliffe (3 Ves. 516), 626
 — v. Westwood, 289, 290
 Hind v. Selby, 446
 Hindle, Megson v., 243
 — v. Taylor (20 B. 109), 417
 — v. Taylor (5 D. M. & G. 577), 595
 Hindmarch, *In bonis*, 32
 Hindmarsh v. Charlton, 27, 30
 Hindson v. Wetherill, 22
 Hine, *In bonis*, 36
 Hinsley v. Ickeringill, 200
 Hinvies v. Hinvies, 446
 Hinxman, A.-G. v., 307, 320
 — Mackworth v., 485
 — v. Poynder, 401
 Hipkins, Blount v., 678
 Hiscocks, Doe d. Hiscocks v., 223, 225
 Hiscoe, *Re*; Hiscoe v. Waite, 493
 Hiscox, Willis v., 353, 504
 Hitchens, Malam v., 441, 442
 Hitchins v. Bassett, 41
 — v. Morrieson, 229
 Hixon v. Oliver, 395
 Hoare v. Hoare, 305, 477
 — v. Osborne, 202, 298, 307, 645
 — Playford v., 361
 — Reid v., 236
 Hobart v. Countess of Suffolk, 401
 Hobbs v. Knight, 45
 Hobbs, Shum v., 462
 Hobgen v. Neale, 267, 270, 541, 542, 546, 548
 Hobson, *In re*; Walker v. Appach, 448
 — v. Blackburn, 13, 109, 171
 — Giblett v., 319
 — Martin v., 161
 — Pattenden v., 281
 Hoby v. Hoby, 53
 Hockenhull, Dutton v., 190
 Hockley v. Mawbey, 344, 580
 Hodge, Barkenshaw v., 122
 — v. Foote, 551
 Hodgens, *Ex parte*; *Re* Hodgens, 441
 — Read v., 301
 Hodges' Trusts, 496
 Hodges, *In re*; Davey v. Ward, 385
 — De Lisle v., 121
 — v. Grant, 118, 167, 334
 — v. Hodges, 664
 — Morris v., 439
 — v. Peacock, 124
 Hodgeson v. Bussey, 391
 Hodgkinson, *In bonis*, 41, 57
 — Parkin v., 562
 Hodgson's Trusts, 334
 Hodgson, *In re*; Hodgson v. Fox, 133
 — A.-G. v., 317, 318
 — Countess of Bective v., 490
 — Earl of Bective v., 146, 147, 214
 — Bowman v., 69
 — v. Clarke, 226
 — v. De Beauclerc, 7
 — v. Fox, 133
 — v. Halford, 481, 486, 497, 499
 — v. Jex, 188, 189
 — Parker v., 458
 — v. Smithson, 526
 Hodgkinson v. Quinn, 373
 Hodsdon, Mayor of Hamilton v., 175
 Hodson, Howlett v., 258
 Hogan v. Byrne, 297
 — v. Jackson, 177
 Hogg, Clarke v., 387
 — v. Cook, 265
 — v. Jones, 593
 — v. Lashley, 11
 — Wilkins v., 389
 Hogge, Shute v., 487, 511
 Holborrow, Pitman v., 411
 Holburne, *Re*; Coates v. Mackillop, 296, 319
 Holden, *In re*; Holden v. Smith, 519
 — v. Ramsbottom, 164
 — v. Smith, 519
 — Stokes v., 99
 Holder v. Preston, 366

- Holderness, Lady, *v.* Lord Carmarthen, 410
 — *Coard v.*, 176
 Holdich *v.* Holdich, 95
 Holdsworth *v.* Davenport, 315
 — *v.* Goose, 368
 Hole *v.* Davies, 524
 Holford, *In re*; Holford *v.* Holford, 147, 148, 385
 — *v.* Wood, 122, 656
 Holgate *v.* Jennings (37 Sol. J. 303), 195
 — *v.* Jennings (24 B. 623), 446
 — *Martin v.*, 268, 542, 545
 — *Priestley v.*, 452
 Holiday, Frogmorton *v.*, 389
 Holland *v.* Allsop, 551
 — *v.* Wood, 255, 547
 — *Yardley v.*, 131
 Hollier *v.* Burne, 438
 Hollingsworth, Finch *v.*, 273
 — *v.* Grassett, 292
 Hollingworth, Faulkener *v.*, 569
 Hollinrake *v.* Lister, 503
 Hollins, Sorresby *v.*, 318
 Hollis *v.* Allan, 441
 Hollon, *Re*; Forbes *v.* Hardcastle, 314
 Holloway, *Re*; Holloway *v.* Holloway, 364
 — *v.* Clarke, 55
 — *v.* Clarkson, 396
 — *v.* Holloway (5 Ves. 399), 286, 287
 — *v.* Holloway (60 L. T. 46), 364
 — *Marshall v.*, 479
 — *Martelli v.*, 485, 598
 — *v.* Radcliffe, 283, 289
 Holman, Hampton *v.*, 480, 487, 488
 Holmden, Lomax *v.*, 238
 Holme, Bankes *v.*, 478, 587
 — *Coldwell v.*, 305
 Holmeden, Lomax *v.*, 416
 Holmes, *Re*; Hallows *v.* Holmes, 515
 — *Re*; Holmes *v.* Holmes, 316, 649
 — *In re*, 596
 — *Avison v.*, 509
 — *v.* Cradock, 456
 — *v.* Crispe, 151
 — *v.* Custance, 220
 — *v.* Godson, 505
 — *Hallows v.*, 515
 — *v.* Holmes (62 L. T. 383), 316, 649
 — *v.* Holmes (1 B. C. C. 555), 633
 — *v.* Penney, 408
 — *Plunkett v.*, 348
 — *v.* Prescott, 146, 455
 — *v.* Sayer Milward, 170
 — *Swan v.*, 93
 — *Waterhouse v.*, 317
 Holmesdale *v.* West (12 Eq. 280), 589
 — *Viscount, v.* West (L. R. 3 Eq. 474), 597
 — *Viscount, Sackville-West v.*, 599, 601
 Holroyd, Pickard *v.*, 499
 Holt *v.* Sindrey, 239, 241, 245
 Holyland *v.* Lewin, 204, 642
 Holyoake, Willoughby Osborne *v.*, 201
 Holzappel, Tapster *v.*, 56
 Home *v.* Pillans, 535
 Homer *v.* Homer, 103
 Homfray, Doe *v.*, 353
 Hone's Trusts, *In re*, 642
 Hone *v.* Medcraft, 131
 Honnor, Webb *v.*, 206
 Honywood, *In bonis*, 24
 — *Bennett v.*, 271, 310
 — *v.* Foster, 92
 — *v.* Honywood, 426, 428, 429
 — *Jeffery v.*, 326, 327, 346
 Hood *v.* Lord Barrington, 70
 — *v.* Clapham, 444
 — *v.* Oglander, 504
 — *Earl Poulett v.*, 162
 — *Remnant v.*, 459
 — *Barrs v.* Cathcart ([1894] 3 Ch. 376), 517
 — *Barrs v.* Cathcart ([1894] 2 Q. B. 559), 517
 Hook, Atlee *v.*, 19
 Hooker, Ledger *v.*, 123
 Hooley *v.* Fountain, 567
 — *v.* Hatton, 122, 123
 Hooper, *Ex parte*, 574, 580
 — *Bate v.*, 377
 — *Masters v.*, 272
 — *Nichols v.*, 584
 — *v.* Strutton, 372
 — *Tagart v.*, 43
 Hope d. Brown *v.* Taylor, 167
 — *Browne v.*, 640
 — *v.* D'Hedouville, 443
 — *v.* Harman, 10
 — *v.* Hope (10 B. 581), 10
 — *v.* Hope (5 Giff. 13), 206, 208
 — *v.* Hope ([1892] 2 Ch. 336), 511
 — *v.* International Financial Society, 498
 — *v.* Liddell, 186
 — *v.* Potter, 621
 Hopkins' Trusts, *In re* (9 Ch. D. 181), 269
 — *Trust (2 H. & M. 411)*, 279, 556
 — *Trusts, In re* (18 Eq. 696), 441
 Hopkins *v.* Abbott, 162
 — *Blount v.*, 135
 — *Dare v.*, 427
 — *v.* Hopkins (Ca. t. Talb. 45), 145, 521

- Hopkins v. Hopkins (1 Ves. Sen. 268),
 145
 — Nelson v., 171
 — v. Phillips, 818
 — v. Ramage, 74
 Hopkinson, Doe v., 456
 — Surtees v., 620
 Hoppe, Morrison v., 176
 Hopwood v. Hopwood, 129
 Horde v. Earl of Suffolk, 310
 Hordern, Laker v., 240
 Horlock v. Wiggins, 631
 — Sweetapple v., 474
 Horn, Almack v., 248
 — Audsley v., 327, 347
 — v. Coleman, 283
 — v. Horn, 375
 Hornbuckle, *In bonis*, 68
 Hornby, *Re*, 644
 — Shrewsbury v., 299
 Horncastle, Marquis of Titchfield v.,
 177
 Horne v. Barton, 602
 Horner's Estate, *In re*; Pomfret v.
 Graham, 551
 Horner, *In re*; Eagleton v. Horner,
 242, 289
 — Eagleton v., 242, 289
 — Giles v., 369
 Hornsby, Simpson v., 605
 Horridge v. Ferguson, 540
 Horsepool v. Watson, 290
 Horsfall, Smith v., 267
 Horsfell, *Re*, 185
 Horsford, *In bonis*, 25, 34, 38, 39
 Hort, Hunt v., 221
 Horton, *Re*; Horton v. Perks, 200
 — Brett v., 252
 — v. Hall, 416
 — v. Horton, 605, 606
 — Medley v., 517
 — v. Perks, 200
 — v. Whittaker, 524
 Horwood v. West, 401, 403
 Hovie, Jackson v., 167
 Hoskin's Trusts, *In re*, 202
 Hosking v. Nicholls, 113, 114
 Hoskins v. Matthews, 7
 Hoste v. Blackman, 195
 — v. Pratt, 257
 — Still v., 223
 Hotchkin, Bateman v. (31 B. 486), 426
 — Bateman v. (10 B. 426), 479
 — v. Humfrey, 471
 Hotchkiss's Trusts, *Re*, 541, 544
 Hotchkys, *In re*; Freke v. Calmady,
 83, 209, 381, 430, 431
 Hotham, A.-G. v., 296
 — Knox v., 405
 — v. Sutton, 158, 189
 Houell v. Barnes, 365, 367
 Hough's Estate, *Re*, 618
 — Will, *Re*, 357
 Houghton, *Re*; Houghton v. Brown,
 530
 Houghton, *In re*; Houghton v.
 Houghton, 419
 — v. Brown, 530
 — v. Franklin, 154
 — v. Houghton, 419
 Houlditch, Tulk v., 496
 Houldsworth, Bennett v., 90, 625
 House v. House, 400
 — v. Way, 445
 Household, *In re*; Household v.
 Household, 381
 — Littlejohns v., 559
 Houston, Ellis v., 242
 — v. Hughes, 359, 360
 — Irving v., 441
 Hovenden, Marjoribanks v., 10, 11
 Hovill, *Ex parte*; *In re* Banks' Trust,
 391
 Howard v. Chaffers, 671
 — v. Collins, 554, 558
 — v. Dryland, 677
 — v. Ducane, 436
 — Fitzroy v., 181
 — v. Howard, 529
 — Sutcliffe v., 253, 421
 — Vaudrey v., 194
 Howarth, *In re*, 386
 — v. Dewell, 395
 — v. Mills, 245
 — v. Rothwell, 416
 Howden, Lord, *In bonis*, 70
 Howe, Beckett v., 28
 — v. Lord Dartmouth, 443
 — Earl, Mundy v., 336
 — Thornton v., 296
 Howell v. Barnes, 365, 367
 — Buckley v., 364
 — Chandler v., 315
 — Pankhurst v., 634
 — Thomas v. (34 Ch. D. 166),
 216
 — Thomas v. (18 Eq. 198), 302,
 303, 617
 — Thomas v. (1 Salk. 170), 495
 — Wheeler v., 673
 — Shepherd, *In re*; Churchill
 v. St. George's Hospital, 128
 Howells v. Jenkins, 90, 93
 — Powell v., 610
 Howes, Gummo v., 352, 557
 — v. Herring, 540
 — Humphreys v., 528
 Howgrave v. Cartier, 470
 Howlett v. Hodson, 258
 Howlin v. Sheppard, 434
 Howse v. Chapman, 316, 656, 659
 Hoy v. Master, 395, 400
 Hoyland, Weldon v., 253, 267
 Hubbard v. Alexander, 124
 — Huffam v., 555, 557
 — v. Lees, 77
 — v. Young, 445
 Hubbuck, Hawkes v., 516
 Huckvale, *In bonis*, 28
 Huddart, Patterson v., 175, 187

- Huddleston, *In re*; Bruno v. Eyston, 204
— v. Gouldbury, 162
Huddlestons, *In bonis*, 23
— Miller v., 120, 121, 417, 659, 660
Hudson's Trusts, *In re*, 654
Hudson, *In re*; Hudson v. Hudson, 415, 611
— v. Cook, 218
— Dowling v., 672
— v. Hudson, 415, 611
— Kirkbank v., 319
— Massey v., 585
— Parish v., 145
— v. Parker, 28
— Turner v., 251, 473
Hudsons, *In re*, 459
Hudspeth, Mayor of Gateshead v., 298, 299, 306
Huffam v. Hubbard, 555, 557
Huggins, Pasmore v., 247
Hughes, *In bonis*, 26
— Re, 184
— v. Anderson, 331
— Arthur v., 530
— Combe v. (2 D. J. & S. 657), 494
— Combe v. (14 Eq. 415), 326, 327
— Doe v., 374
— v. Ellis, 506
— v. Empson, 377
— v. Evans, 402
— Flint v., 399
— Houston v., 359
— v. Hughes, 258
— Jenkins v., 386
— v. Jones, 106, 193
— Long v., 412
— Moreton v., 541, 641, 643
— v. Pritchard, 168
— v. Sayer, 585
— v. Stubbs, 10
— v. Thomas, 180
— v. Turner, 107, 207
— Williams v., 118, 156
Hugo, *In bonis*, 67
— v. Williams, 349, 488
Huguenin, Davies v., 236, 237, 459
Huiah, *In re*; Bradshaw v. Huiah, 631
— Paget v., 118
Hull v. Christian, 415
— v. Hill, 164
Humberston v. Humberston, 487
Humberstone v. Stanton, 528
Humble v. Bowman, 76, 274
— v. Humble, 671
— v. Shore, 195
Hume, *In re*; Forbes v. Hume, 311
— v. Lloyd, 270
— v. Lopes, 378
— v. Richardson, 447
— Whicker v., 8, 295, 321
Humfrey, Hotchkin v., 471
— v. Humfrey, 546
Humpage, Grafftey v., 291
Humphery v. Humphery, 196, 204
Humphrey v. Humphrey, 394
— Wentworth v., 74
Humphreys, *In re*; Humphreys v. Levett, 150, 154, 440
— v. Green, 13
— v. Howes, 528
— v. Humphreys (4 Eq. 475), 606
— v. Humphreys (2 Cox, 186) 662
— v. Levett, 150, 154, 440
Humphries, *In re*; Smith v. Milledge 240
— v. Humphries, 129
Hungerford, Countess of Bristol v., 214, 401
Hunsdon, Bird v., 606
Hunt's Trusts, *In re*, 207
Hunt, *In bonis* (23 W. R. 553), 21
— *In bonis* (2 Rob. 622), 61
— Re; Davies v. Hetherington, 621
— Bromhead v., 612
— v. Dorsett, 252
— v. Hort, 221
— v. Hunt, 25
— v. Moore, 454
— v. Parry, 386
— Pedder v., 354
— Pinney v., 71
— Robinson v., 414, 581
Hunt-Foulston v. Furber, 411
Hunter's Trusts, 466, 468, 559
Hunter, *Ex parte*, 540
— Bowker v., 654
— Carron Company v., 144
— v. Cheshire, 544
— v. Judd, 462
— Pulsford v., 465, 466
— Ravenscroft v., 33
— v. Tedlie, 287
Huntington v. Huntington, 53
Hurle, Hartley v., 182, 678
Hurlock, Jackson v., 55, 645
Hurrell, Doe d. Hurrell v., 176
Hurry v. Hurry, 546
— v. Morgan, 551
Hurst, *In re*, 381
— A.-G. v., 657
— v. Beach, 122, 125
— v. Hurst (21 Ch. D. 278), 422, 507, 525
— v. Hurst (28 Ch. D. 159), 663
Husband v. Martin, 318
Huskiasson v. Bridge, 400
Hussey v. Berkeley, 267
— Mordaunt v., 653
Hutcheon v. Mannington, 568
Hutcheson v. Hammond, 212, 218, 501, 638
— v. Jones, 255

- Hutchin v. Osborne, 198
 Hutchings to Burt, *Re*, 516
 — v. Wood, 60
 Hutchinson's Trusts, *In re*, 253
 Hutchinson and Tenant, *In re*, 274,
 275, 403, 404
 Hutchinson, *Re*, 537
 — *In re*; Alexander v. Jolley, 470
 — v. Burrow, 106
 — Chamberlain v., 200
 — v. Hutchinson, 163
 — Metcalfe v., 674
 — v. Smith, 164
 — v. Stephens, 340
 Huthwaite, Doe d. Chevalier v., 226
 Hutton, *In bonis*, 63
 — v. Simpson, 604
 Hyde, A.-G. v., 319
 — v. Hyde, 37
 — v. Mason, 38
 — Paine v., 503
 — Tylden v., 372
 Hyder, Furley v., 447
 Hyett v. Mekin, 219
 Hyslop, Maxwell v., 96, 140
- IBBETSON, *In bonis*, 34, 39
 — v. Ibbetson, 484, 485
 Ibbotson v. Elam, 144, 440
 Ibbott v. Bell, 32
 Ickeringill, *In re*; Hinsley v. Ickeringill, 200
 Idle v. Cook, 336, 337, 579
 Iggliden, Launcefield v., 117, 662
 Ikin, Madden v., 234, 472
 Ilchester, *Re parte*, 37, 55
 Illingworth v. Cooke, 221
 Illsley v. Randall, 417
 Illott v. Genge, 28
 Ince, *In bonis*, 58
 Inchiquin, Lord, Montagu v., 599
 Incledon v. Northcote, 152
 Incorporated Church Building Society v. Coles, 312, 323
 Incorporated Society v. Barlow, 318, 320
 Incorporated Society v. Richards, 98, 180, 321, 573
 Indian Chief, The, 6, 8
 Inge, Walker v., 88
 Ingham v. Daly, 661
 — v. Ingham, 529, 530
 — v. Rayner, 233, 266
 Ingle's Trusts, *Re*, 223, 249
 Ingleby Boak, *In re*, 78, 368
 — Carr v., 412
 Inglefield v. Coghlan, 513
 Ingleman v. Worthington, 416
 Inglesant v. Inglesant, 27, 28
 Ingoldby v. Ingoldby, 62
 Ingram, Buckeridge v., 54
 — Shepherd v., 147, 255, 260
 — v. Soutten, 532, 557
 — Strong v., 126
- Ingram v. Suckling, 464
 — v. Wyatt, 21
 Inman, *In re*; Inman v. Rolls, 153
 Innes v. Johnson, 116
 — v. Sayer, 206
 Inskip, Braybroke, Lord, v., 185
 Insole, Whitehouse v., 661
 International Financial Society, Hope v., 498
 Ion v. Ashton, 679
 Irby, Sanford v. (3 B. & Ald. 654), 583
 — Sanford v. (4 L. J. Ch. 23), 173
 Iredell v. Iredell, 258, 264
 Ireland, Churchman v., 95
 Ironmonger, Barnwell v., 667
 Ironmonger, Irvin v., 155
 Irvin v. Ironmonger, 155
 Irvine, Macdonald v., 111, 113, 119, 443, 446
 — v. Sullivan, 64, 400, 402
 Irving v. Houston, 441
 — James v., 194
 Isaac v. Defries, 302
 — v. Wall, 436
 Isaacs, *In re*; Isaacs v. Raginall, 217
 Isaacson, King v., 462
 — v. Van Goor, 606
 — v. Webster, 464, 465
 Israel v. Rodon, 35, 55, 56
 Ivatt, Wilson v., 654
 Ivatt, Markham v., 192, 289
 Ive v. King, 332, 542, 547, 548, 560
 Ives v. Dodgson, 613
 Ivison v. Gassiot, 189
 Izod v. Izod, 327
 Izon v. Butler, 639
 — Scott v., 383
- JACKMAN, Bradshaw v., 297, 301
 — Stanley v., 333, 600, 601, 602
 Jackson's Trusts, *In re* (14 Ir. Ch. 472), 550
 — Will, *In re* (12 Ch. D. 189), 76
 Jackson, *In re*; Jackson v. Talbot, 381
 — *In re*; Shiers v. Ashworth, 645
 — *Re*; Biscoe v. Jackson, 320
 — Allen v., 451, 499
 — Biscoe v., 304, 305, 306, 320
 — v. Calvert, 394
 — Cupit v., 409
 — v. Dover, 469, 470
 — Faulds v., 27, 28, 29
 — Green v., 212
 — v. Hamilton, 623, 663
 — Harrison v., 116, 128
 — Hogan v., 177
 — v. Hosie, 167
 — v. Hurlock, 55, 645
 — v. Jackson (2 Cox, 35), 123

- Jackson v. Jackson (1 Ves. Sen. 216), 620
 — Lloyd v., 339
 — v. Noble, 525
 — Oates d. Hatterly v., 326, 346
 — v. Pease, 662, 665
 — Pitt v., 347, 488
 — Pratt v., 164, 165
 — Rous v., 486
 — Russell v., 65, 324
 — v. Sparks, 553
 — v. Talbot, 381
 — Walker v., 678
 Jacobs v. Amyott, 392
 — v. Jacobs, 280, 281, 289
 — Jull v., 192, 453, 647
 Jacques v. Chambers, 109, 135
 Jacson v. Governors of Queen Anne's Bounty, 316
 Jaggard, Cook v., 177
 — Umbers v., 234, 235, 588
 Jagger v. Jagger, 490
 James, *In bonis* (1 Sw. & T. 238), 34
 — *In bonis* (7 Jur. N. S. 52), 45
 — *Re*; Clutterbuck v. James, 508
 — Affleck v., 176, 364
 — v. Allen, 298, 306
 — v. Avis, 180
 — v. Baker, 530
 — Beauclerk v., 89
 — Boughton v., 489
 — Clutterbuck v., 508
 — v. Dawson, 575
 — v. Dean, 131
 — Hayward v., 565, 566
 — v. Irving, 194
 — v. James, 17
 — v. Jones, 673
 — Locke v., 39, 44, 54
 — Merest v., 355
 — Miller v., 70
 — Phillips v., 601
 — Romilly v., 337
 — v. Shannon, 605, 607
 — v. Shrimpton, 37
 — v. Smith, 241, 266
 — Symons v., 672
 — White v., 409
 — Williams v., 551
 Jameson v. Cooke, 52
 Jamson, Vezey v., 306, 652
 Jardine, Hewitt v., 633
 Jarman's Estate, *In re*; Leavers v. Clayton, 298, 306
 — Trusts, 538
 Jarman, Cooper v., 218
 — Silvester v., 163
 — v. Vye, 576, 584
 Jarratt, Crompton v., 170
 Jarvis, Brown v., 253
 — Miles v., 261, 521
 — v. Pond, 543, 544
 Jauncey v. A.-G., 150, 156
 Jay, Ferries v., 205
 — Leach v., 177
 Jeaffreson's Trusts, *In re*, 191, 392
 Jearrod v. Banister, 336
 Jebb v. Tugwell, 444
 Jee v. Audley, 477, 480
 Jeff v. Robinson, 347
 Jefferies v. Michell, 223, 631
 — Tuckerman v., 422
 Jeffery, *In re*; Burt v. Arnold, 148
 — v. Cancer Hospital, 34
 — v. De Vitre, 326, 327
 — v. Honeywood, 326, 327, 346
 — Roe d. Sheers v., 589
 Jeffery's Trusts, *In re*, 610
 Jefferys v. Marshall, 369
 Jeffray v. Tredwell, 458
 Jeffrey's Trusts, 114
 Jeffreys v. Conner, 575
 — v. Jeffreys, 114
 Jeffries v. Alexander, 314
 Jegen, Archer v., 472
 — Vivian v., 362, 435
 Jellicoe, Cusack v., 152
 — Gardiner v., 589, 591
 Jenkin, Rhodes v., 372
 Jenkins' Trusts, *In re*, 505, 506
 Jenkins, Flinn v., 253
 — v. Gower, 238
 — Howells v., 90, 93
 — v. Hughes, 336
 — v. Jenkins, 563
 — v. Jones, 123
 — v. Morris, 14
 — Tatlock v., 616, 677
 — Williams v., 665, 666
 — Wilmot v., 662
 — Woolley v., 370
 Jenkinson, Murthwaite v., 359
 Jenkyns v. Gaisford, 24
 Jenner v. Finch, 29, 41
 — v. Morris, 439
 — v. Turner, 499
 Jennings v. Baily, 394
 — Barnes v., 528, 542
 — v. Gallimore, 291
 — Holgate v., 195, 446
 — v. Jennings, 102
 — Rawlings v., 189, 394, 413, 654
 — Springett v., 192
 Jermy v. Preston, 219
 Jerningham v. Herbert, 623
 Jersey, Lord, Doe d. Beach v., 102, 108
 Jervis v. Lawrence, 293, 316
 — Radburn v., 63, 155, 410
 — v. Wolferstan, 639
 Jervoise v. Jervoise, 92
 — v. Duke of Northumberland, 598
 Jeasep, Doe d. Usher v., 570
 Jeason v. Wright, 343, 350, 352
 Jeasop, *Re*, 618

- Jesus Coll., A.-G. v., 308
 Jeune v. Baring, 382, 434
 Jevens, *In re*, 68
 — Talbot v., 493
 Jewks, Sutton v., 499
 Jex, Hodgson v., 188, 189
 Jeyes, Doe d. Pall v., 180
 — v. Savage, 469, 541, 575
 Jobling, Black v., 43
 Jobson's Case, 284
 Jobson, *In re*; Jobson v. Richardson, 454, 462
 — Smith v., 243, 244
 Jodrell, *In re*; Jodrell v. Seale, 243
 — v. Jodrell, 429
 — v. Seale, 243
 — Seale-Hayne v., 243, 596
 — Wilkins v. (11 W. R. 588), 164
 — Wilkins v. (18 Ch. D. 564), 415, 530
 Joel v. Mills, 422
 Johnson's Trusts, *Re* (10 L. T. N. S. 455), 533, 560
 — Trust, *In re* (L. R. 2 Eq. 716), 593
 Johnson, *In bonis*, 51
 — *Re*; Danily v. Johnson, 647
 — *In re*; Shearman v. Robinson, 383
 — v. Antrobus, 530
 — v. Arnold, 209
 — v. Ball, 64
 — Bird v., 506
 — v. Child, 136
 — v. Cope, 252
 — v. Crook, 568
 — Danily v., 647
 — Doe d. Johnson v., 583
 — Elliott v., 300
 — v. Foulds, 235, 461
 — v. Gallagher, 664
 — Goodier v., 479, 482
 — v. Harrowby, Lord, 125
 — Innes v., 116
 — v. Johnson (2 Coll. 441), 443
 — v. Johnson (8 Ex. 81), 583
 — v. Johnson (4 B. 313), 640, 648, 649
 — v. Johnson (3 Ha. 157), 642
 — v. Kennett, 373, 374, 375
 — v. Lyford, 47
 — Moore v., 449
 — Newstead v., 654
 — v. O'Neill, 153
 — Purday v., 297, 298, 305
 — v. Routh, 443, 448
 — v. Simcock, 572
 — v. Smaling, 532
 — v. Swann, 313, 317, 318
 — Taylor v., 153
 — v. Telford, 96
 — v. Webster, 674
 — v. Wells, 55
 Johnston, *In re*; Cockerell v. Earl of Essex, 130, 155, 156, 592, 599
 — *In re*; Mills v. Johnston, 406
 — v. Beattie, 5, 7
 — Edgeworth v., 633
 — v. Hill, 477
 — v. Johnston, 55
 — Mills v., 406
 — v. Moore, 444
 — Murphy v., 345
 Johnstone's Settlement, *In re*, 129
 Johnstone, A.-G. v., 193
 — v. Baker (4 W. R. 827), 170
 — v. Baker (8 B. 233), 365
 — Bempde v., 6
 — Fairtlough v., 89
 — v. Hamilton, 650, 652
 — Murray v., 615
 — Norton v., 491
 Jolley, Alexander v., 470
 Jonas, Webb v., 379
 Jones's Estate, *In re*; Hume v. Lloyd, 269
 — *In re* (47 L. J. Ch. 775), 548
 Jones's Will, *In re* (23 L. T. 211), 505
 Jones, *In bonis* (34 L. J. P. 41), 25
 — *In bonis* (Dea. & Sw. 3), 27
 — *In bonis* (46 L. J. P. 80), 69
 — *In re*; Dutton v. Brookfield, 376
 — *In re*; Greene v. Gordon, 198
 — *In re*; Jones v. Caless, 657
 — Adams v., 226
 — Atkinson v., 538
 — A.-G. v., 10
 — v. Badley, 66
 — v. Blake, 371
 — Blake v., 371
 — v. Bruce, 678
 — Burke v., 669
 — v. Caless, 657
 — v. Colbeck, 272
 — v. Cullimore, 586
 — v. Curry, 196
 — v. Davies, 525
 — and Evans, Davies to, 357
 — Edwards v. (33 B. 384), 333
 — Edwards v. (35 B. 474), 623
 — Evans v. (46 L. J. Ex. 280), 177
 — Evans v. (2 Coll. 516), 193, 268
 — v. Frewin, 541
 — Goodright v., 523
 — v. Green, 127
 — Griffiths v., 302
 — v. Harding, 46
 — v. Hawkins, 86
 — v. Henley, 227
 — d. Henry v. Hancock, 623
 — v. Henaler, 642

- Jones, Hill *v.* (37 L. J. Ch. 46),
 126
 — Hill *v.* (2 W. R. 657), 318
 — Hogg *v.*, 593
 — Hughes *v.*, 105, 193
 — Hutcheson *v.*, 255
 — James *v.*, 873
 — Jenkins *v.*, 128
 — *v.* Jones (29 W. R. 786), 332
 — *v.* Jones (5 Ha. 440), 437,
 438
 — *v.* Jones (1 Q. B. D. 279),
 498
 — *v.* Jones (13 Sim. 561), 564,
 565
 — Lucas *v.*, 312, 313
 — *v.* Mackilwain, 464
 — Macoubrey *v.*, 235, 236
 — *v.* Meggs, 492, 494
 — *v.* Mason, 274, 293, 415, 433
 — *v.* Mitchell, 212
 — *v.* Morgau (1 B. C. C. 206),
 348, 435
 — *v.* Morgan (3 B. P. C. 322),
 537
 — *v.* Newman, 223
 — *v.* Nicolay, 11
 — *v.* Ogle, 144, 145
 — *v.* Owens, 378
 — Paine *v.*, 437
 — *v.* Price, 270
 — *v.* Randall, 421
 — Ravenscroft *v.*, 632, 633, 634
 — *v.* Robinson, 175
 — Rogers *v.*, 87
 — *v.* Ryan, 533
 — *v.* Salter, 516
 — *v.* Lord Say, 358
 — Scott *v.*, 669
 — *v.* Skinner, 180
 — *v.* Southall, 128, 129, 200
 — Stewart *v.*, 541, 641, 643
 — *v.* Suffolk, 495, 496
 — Thomas *v.*, 75, 199, 200
 — Tilson *v.*, 530
 — *v.* Tucker, 196, 206
 — Wellbeloved *v.*, 309
 — *v.* Westcomb, 527, 528, 654
 — Williams *v.*, 654
 Jones-Ford, Shaw *v.*, 395, 437, 506,
 519, 520
 Jongsma *v.* Jongsma, 175
 Jopp *v.* Wood (28 B. 53), 564
 — *v.* Wood (34 B. 88), 4
 Jordan, *In bonis*, 67, 68
 Jordan's Trust, *Re*, 543
 Jordan *v.* Adams, 279, 350, 353
 — *v.* Fortescue, 613
 — *v.* Lowe, 394
 Joseph, Abraham *v.*, 45
 Joslin *v.* Hammond, 530
 Josselyn, Scott *v.*, 395
 — Sparrow *v.*, 116, 117
 Joy, *Re*; Purday *v.* Johnson, 297,
 298, 304, 305
 Joyner *v.* Weeks, 430
 Joynt *v.* Richards, 410
 Joys, *In bonis*, 42
 Jubber *v.* Jubber, 231, 404, 623
 Judd's Trusts, *In re*, 268
 Judd, Hunter *v.*, 462
 — *v.* Judd, 462
 Judkin's Trusts, *In re*, 149, 153, 385
 Juler *v.* Juler, 651
 Jull *v.* Jacobs, 192, 453, 647
 Jupp, *In bonis*, 165, 188
 — *In re*; Jupp *v.* Buckwell, 230
 Jury *v.* Jury, 328, 332
 Justice, Parsons *v.*, 259, 263
 Jutting, Wrench *v.*, 190, 192

 KANE *v.* Cosgrave, 310
 Kavanagh's Will, *Re*, 268
 Kavanagh, *In re*, 379
 — *v.* Morland, 355
 — *In re* Ryan and, 376
 Kaye *v.* Banks, 425
 — *v.* Laxon, 171
 Kayes, Arnold *v.*, 135, 414, 515
 — Tucker *v.*, 645
 Kearney, Devitt *v.*, 166, 377, 382
 Kearsley *v.* Woodcock, 407, 505
 Keates *v.* Burton, 367
 Keating *v.* Brooks, 26
 — *v.* Keating, 380
 Keatings, Kelly *v.*, 23
 Keay *v.* Boulton, 281, 540
 Kebball, Batsford *v.*, 465
 Keble, Mathews *v.*, 491, 492, 670
 Keegan, Liston *v.*, 300
 Keeling *v.* Brown, 672
 — *v.* Smith, 502
 Keen *v.* Keen, 46
 — *v.* Walbank, 361
 Keep's Will, *In re*, 551
 Kehoe, *In bonis*, 61, 71
 — *v.* Wilson, 300, 301
 Keighley, Malim *v.*, 401, 403
 Keigwin *v.* Keigwin, 28
 Kelly *v.* Fowler, 584
 Keir, Da Costa *v.*, 534
 Kekewich *v.* Marker, 423
 — Peard *v.*, 477, 491
 Kell *v.* Charmer, 101, 221
 Keller, *In bonis*, 3, 64
 Kellett *v.* Kellett (3 Dow, 248), 167,
 401
 — *v.* Kellett (L. R. 3 H. L. 160),
 395, 397
 — *v.* Kellett (I. R. 5 Eq. 298),
 610, 640
 — Russell *v.*, 304, 305
 Kelly's Settlement, *Re*; West *v.*
 Turner, 507, 508
 Kelly, *Re*, 417
 — Allan *v.*, 113
 — Belaney *v.*, 86
 — *v.* Duffy, 180

- Kelly, Duggan v., 499, 536
 — Fitzwilliams v., 119, 134, 135
 — v. Hammond, 241
 — v. Keatinge, 28
 — v. Pollock, 334
 — v. Powlett, 164
 Kelsey v. Ellis, 422, 544
 — v. Kelsey, 409
 Kelynge, Phipps v., 490
 Kemble, *Re* Sheldon and, 519
 Kemeys, Denu d. Wilkins v., 572
 Kemeys-Tynte, *In re*; Kemeys-Tynte v. Kemeys-Tynte, 429
 Kemmis v. Kemmis, 386
 Kemp, Gould v., 331
 — v. Haynes, 503
 Kempton, Thornton v., 316
 Kendall's Trust, 188
 Kendall v. Granger, 298, 306
 — v. Kendall, 187
 Kenebel v. Scrafton, 55, 238
 Kenlis, Lord, v. Bective, Earl of, 590
 Kennedy, Bell v., 5, 6, 8
 — Bethune v., 120, 445
 — v. Kennedy, 110
 — v. Kingston, 76, 263
 — Kirwan v., 433, 434
 — Molony v., 512
 — v. Sidgwick, 574
 — Withers v., 673
 Kennell v. Abbott, 213
 Kennerley v. Kennerley, 599
 — Swaine v., 238
 Kennett, *In bonis*, 37
 — Johnson v., 374, 375
 — Sheffield v., 575
 Kennicott, Henderson v., 563
 Kennington, Cross v., 672
 Kenny, Sherwin v., 341
 Kenrick v. Lord Beauclerk, 358, 362, 496
 — Curteis v., 197
 Kensey v. Langham, 170
 Kensington v. Bouverie, 433, 434
 Kent, A.-G. v., 7, 8
 — Brooke v., 38
 — De Gendre v., 144
 — Marsden v., 377
 Kenworthy v. Ward, 328, 332
 Kenyon's Estate, *Re*; Mann v. Knapp, 129
 Keogh's Estate, *In re*, 630
 Keogh, Ryan v., 404, 415
 Keown's Estate, 200
 Ker, Baker v., 514
 — v. Dent, 315
 — v. Lord Dungannon, 485
 — v. Ker, 143
 — Weller v., 367
 Kermode v. Macdonald, 116, 616, 619
 Kerr, *In re* ([1894] P. 284), 79
 Kerr's Trusts, *In re* (4 Ch. D. 600), 328
 Kerr v. Baroness Clinton, 617
 — v. Middlesex Hospital, 413
 Kerran, Smith v., 81
 Kerridge, Lynn v., 159
 Kerrison's Trusts, *In re*, 386
 Kerry, *In re*, 174
 Kershaw's Trusts, *In re*, 387
 Kershaw, *In re*; Drake v. Kershaw, 138
 — Drake v., 138
 — v. Kershaw, 419
 — Williams v., 306
 Kett, Back v., 95
 Kevern v. Williams, 257
 Kevil v. Lynch, 24
 Key v. Key (4 D. M. & G. 73), 456, 580
 — v. Key (1 Jur. N. S. 372), 570
 — Scott v., 404
 Keymer, Willis v., 402
 Kiallmark v. Kiallmark, 504
 Kibbett v. Lee, 77
 Kidd, *In re*; Brooman v. Withall, 139
 — *Re*; Kidd v. Kidd, 383
 — v. North, 123
 — Shand v., 540
 Kiddell, Sanders v., 156
 Kidman v. Kidman, 153, 468
 Kidney v. Coussmaker (12 Ves. 136), 91
 — v. Coussmaker (1 Ves. Jun. 436), 211
 Kiff v. Roberts, 188
 Kilbee, Seymour v., 608
 Kilburne, Theebridge v., 391
 Kilcher, *In bonis*, 31
 Kilford v. Blaney, 675, 676, 678
 Killey, Lewin v., 533
 Killick, *Ex parte*, 514
 Kilmorey, Lord, Leche v., 405
 Kilner v. Leech, 282
 Kilpatrick, Kirkpatrick v., 535
 Kilvert's Trusts, 220, 305
 Kilvington v. Parker, 618
 Kimber v. Cafe, 361
 — Lywood v., 278
 Kimberley, Lord, Bjorkman v., 156
 — v. Tew, 472
 Kimpton, Davidson v., 558
 Kinch v. Ward, 349
 King's Mortgage, 162
 — Settlement, *Re* Gibson v. Wright, 288
 — Trust, *In re*, 167, 499, 500
 King, *In bonis*, 33
 — *Re*; Salisbury v. Ridley, 570
 — v. Bennett, 232
 — v. Burchell, 356
 — v. Cleaveland, 289, 290, 291, 540
 — v. Cullen, 256, 562

- King, Darley v.**, 510
 — *v. Denison*, 401, 645, 653
 — *v. Foxwell*, 6, 8
 — *v. Frost*, 550, 552, 553, 558, 583, 584
 — *v. George*, 187
 — *v. Hake*, 4721
 — *Hegarty v.*, 22
 — *v. Isaacson*, 462
 — *Ive v.*, 332, 542, 547, 548, 560
 — *v. King* (15 Ir. Ch. 479), 91
 — *v. King* (13 L. R. Ir. 531), 91, 102
 — *Mackenzie v.*, 620
 — *Moore v.*, 26
 — *O'Donohoe v.*, 585
 — *O'Halloran v.*, 515, 516
 — *Rafferty v.*, 434
 — *v. Ringstead*, 604, 605
 — *Skipper v.*, 469
 — *Smith v.*, 410
 — *v. Taylor*, 529
 — *Theobald v.*, 444
 — *Turner v.*, 396
 — *Urquhart v.*, 653, 655
 — *Vanderplank v.*, 332, 477, 487, 488, 611
 — *Whiteley v.*, 46
 — *v. Whitten*, 483, 484
 — *v. Withers*, 458
 — *Wollaston v.*, 89, 486
King's Proctor v. Daines, 11
Kingdon, In re; Wilkins v. Pryer, 42
Kingsbury, Tricker v., 500
Kingscote, Pennant v., 26
Kingston, Bull v., 395
 — *Kennedy v.*, 76, 263
Kinsella v. Caffray, 609
Kirby v. Potter, 114
Kirk, In re; Kirk v. Kirk, 641, 676
 — *In re; Nicolson v. Kirk*, 247
 — *Ex parte; In re Bennett*, 110, 163
 — *Davis v.*, 276
 — *v. Eddowes*, 633
 — *v. Kirk*, 641, 676
 — *Nicolson v.*, 247
 — *v. Paulin*, 512
Kirkbank v. Hudson, 319
Kirkbride's Trusts, In re, 572
Kirke v. Kirke, 39, 44
Kirkham v. Smith, 88
Kirkman v. Booth, 382
 — *v. Lewis*, 307
Kirkpatrick v. Bedford, 122, 150, 155
 — *v. Kilpatrick*, 535
Kirsopp, Grieseson v., 262
Kirwan's Trusts, In re, 2, 12
Kirwan v. Kennedy, 433, 434
Kittoe, Bagot v., 439
Knapman's Estate, In re; Knapman v. Wreford, 133
Knapp's Settlement, In re; Knapp v. Vassall, 257, 259
Knapp v. Knapp, 471
 — *Mann v.*, 129
 — *v. Noyes*, 536
 — *v. Vassall*, 257, 259
 — *v. Williams*, 316
Knapping v. Tomlinson, 483
Knight, In re; Knight v. Burgess, 132
 — *Blake v.*, 28
 — *v. Boughton* (3 B. 148; 11 Cl. & F. 513), 399
 — *Boughton v.* (3 P. & D. 64), 14
 — *v. Browne*, 422
 — *v. Burgess*, 132
 — *v. Davis*, 134
 — *v. Ellis*, 393
 — *v. Gould*, 645
 — *Harris v.*, 69
 — *Hobbs v.*, 45
 — *v. Knight* (2 S. & St. 490), 153, 466
 — *v. Knight* (25 B. 111), 556
 — *v. Knight* (W. N. 1895, 15), 677
 — *Leese v.*, 616
 — *Lovell v.*, 197
 — *Parkin v.*, 343, 393
 — *v. Robinson*, 162
 — *v. Rugg*, 575
 — *Seagram v.*, 427
 — *v. Selby*, 340, 341
Knight-Bruce v. Butterworth, 208
Knightley, Farrington v., 653
 — *Trower v.*, 371
Knightly, Yarrow v., 333, 340, 341
Knipe, Ogle v., 158, 162
Knivet's, Sir Henry, Case, 481
Knocker v. Bunbury, 365
Knollys v. Shepherd, 184
Knott v. Lawton, 340
Knowles, In re; Nottage v. Buxton, 471
 — *Re; Rainford v. Knowles*, 291
 — *In re; Roose v. Chalk*, 652, 654
 — *Ashling v.*, 542
 — *Rainford v.*, 291
 — *v. Sadler*, 125
Knox, In bonis, 499
 — *v. Hotham*, 405
 — *v. Wells*, 230, 231, 469
 — *Wilson v.*, 465
Koe, Clifford v., 346
Kuffin, Roberts v., 110, 191
Kynaston, Norman v., 397
Kynneraley, Ormond v., 428
Kynock, Cooper v., 361

- LACKY v. Hill, 94, 181
 Lachlan v. Reynolds, 343, 480
 Lacon, *In re*; Lacon v. Lacon, 632, 633
 — Martin v., 316
 Lacroix, *In bonis*, 2
 Lacy, Dick v., 253, 393
 — v. Stone, 668
 Ladley, Rickets v., 118
 Laing v. Cowan, 199, 201
 — v. Laing, 599
 Lainson v. Lainson, 647
 Laird, *In bonis*; *In bonis* Russell, 81
 Lake v. Currie, 198
 — Lord, Lord Selsey v., 250
 — White v., 156, 167
 Laker v. Hordern, 240
 Lakes, Gould v., 32
 Lakin v. Lakin, 191
 Lamar v. Micou, 5
 Lamb, *In bonis*, 53
 — Blacket v., 91
 — Bland v., 186, 193
 — Locke v., 257, 463, 466
 — Salisbury v., 556, 566
 Lambard v. Peach, 588, 590
 — v. Turton, 590
 Lambe v. Eames, 274, 404
 Lambert's Estate, *In re*; Stanton v. Lambert, 67, 68, 511
 Lambert v. Browne, 357, 365
 — Cook v., 29
 — Dick v., 653
 — v. Lambert (11 Ves. 607), 115
 — v. Lambert (16 Eq. 320), 446
 — v. Parker, 152
 — Stanton v., 68, 511
 — Taylor v., 459, 463
 — v. Thwaites, 262, 263
 — Zouch v., 653
 Laming, Doe v., 350
 Lamkin v. Babb, 53
 Lampet's Case, 518
 Lamphier v. Despard, 189
 Lampley v. Blower, 327, 393
 Lancashire, Doe v., 55
 Lancaster, *In bonis* (29 L. J. P. 155), 61
 — *In bonis* (1 Sw. & T. 464), 67
 — Mostyn v., 376
 — v. Thornton, 365
 — Willan v., 672
 Lance v. Aglionby, 678
 Lancefield v. Iggulden, 117, 662
 Land v. Devaynes, 180
 — Lowe v., 551
 Lande, Brydges v., 672
 Lander, Nesbitt v., 139
 Lane, *In re*; Luard v. Lane, 128
 — v. Debenham, 365
 — Finch v., 455
 — v. Goudge, 464, 467
 Lane v. Green, 250
 — Long v., 569, 571, 572
 — Luard v., 128
 — v. Pannel, 521
 — v. Rhoades, 195
 — v. Sewell, 165
 — v. Stanhope, 170
 Lanesborough, Lady, v. Fox, 478, 587
 Laneville, Anderson v., 8
 Lang v. Pugh, 463
 Lang's Will, 287
 Langdale, Lord, Ashton v., 315
 — Lady, v. Briggs, 106, 114
 — v. Esmonde, 119
 — Grattan v., 237, 579
 — v. Whitfield (4 K. & J. 426), 159, 160
 — Whitfield v. (1 Ch. D. 61), 102, 108
 Langdon, Gibbons v., 537
 Langford, *In bonis*, 80
 — v. Gowland, 304
 Langham, Kensey v., 170
 — Morrice v., 590
 — v. Nenny, 196
 — v. Sanford, 653
 Langlands, Doe d. Walls v., 175
 Langley v. Baldwin, 580
 — Broughton v., 348
 — v. Langley, 537
 Langston v. Langston (21 B. 552), 89
 — v. Langston (8 Bli. N. S. 16), 237
 Langton, Doe d. Gore v., 172
 Langworthy, Darley v., 452, 616
 Lance, Parsons v., 58
 Lanphier v. Buck, 334, 546
 Lansdell, Davey v., 34
 Lantsbery v. Collier, 370, 480
 Larcher, Bright v., 211, 416, 677
 Large's Case, 504
 Larking, *In re*; Larking v. Larking, 128, 192
 Larkman, Coward v., 172, 394
 Larnier v. Larnier, 159
 Laroche, Cooper v., 477
 La Roche v. Davies, 540
 Lascelles, Agar-Ellis v., 85
 Lashley, Hogg v., 11
 Lashmar, *In re*; Moody v. Penfold, 358, 650
 — Thorncroft v., 10
 Laslett, Walpole v., 457
 Lassence v. Tierney, 397
 Latham v. Atwood, 431
 Lathbury, Tait v., 365
 Lauderdale Peerage, The, 7
 Laundry v. Williams, 154
 Lavender v. Adams (1 Add. 403), 33
 — Adams v. (McCl. & Y. 41), 630
 — Archer v., 512
 Laver, Doutty v., 524
 Laverton, Martin v., 185

- Lavie, Lechmere v., 399
 Law v. Thorp, 393
 — v. Thompson, 568
 Lawday, West v. (11 H. L. 375), 104
 — West v. (1. R. 2 Eq. 517), 657
 Lawes, *In re*; Lawes v. Lawes, 626,
 633
 — A.-G. v., 299
 — v. Bennett, 216, 217
 — v. Lawes, 626, 633
 Lawless, Alder v., 420
 — Parfitt v., 22
 — Shaw v., 86
 Lawley, Lady, Thompson v., 171,
 182
 Lawlor v. Henderson, 271
 Lawrance, Brownson v., 140, 142
 Lawrence, Gibbs v., 190
 — Jervis v., 293, 316
 — v. Lawrence (2 Ver. 365), 95
 — v. Lawrence (26 Ch. D. 795),
 144
 — v. Maggs, 436
 — v. Wallis, 17
 Laws, Blacklow v., 365, 512
 — Meyrick v., 589
 Lawson, Dempsey v., 41
 — Doe v. 286, 287, 288
 — v. Duncan, 664
 — Duncan v., 1
 — Nightingale v., 436, 438
 — Tewart v., 491
 Lawton, Doe d. Knott v., 340
 — v. Lawton, 431
 Laxon, Kaye v., 171
 Laxton v. Eedle, 415
 — Walker v., 117
 Lay, *In bonis*, 52
 — *In re*; Whytehead v. Boul-
 ton, 551
 — Franklin v., 344
 Layborn v. Grover Wright, 169
 Layton, Treharne v., 574
 Lazonby v. Rawson, 416
 Lea, *In re*; Lea v. Cooke, 295, 309
 — Barker v., 466, 468, 537
 — v. Cooke, 295, 309
 — v. Thorp, 251
 Leach, *In bonis*, 46
 — v. Jay, 177
 — v. Leach, 641
 Leacroft v. Maynard, 125
 Leadbeater, Assignees of, 586
 — v. Cross, 456
 Leader v. Duffey, 473, 564
 Leak, Scott v., 409
 Leake v. Leake, 236, 628, 629
 — v. Macdowell, 292
 — v. Robinson, 461, 482
 Lean v. Lean, 444
 — Treloar v., 46
 Leapingwell, Page v., 114, 117, 120,
 312
 Lear v. Leggett, 507
 Leathes v. Leathes, 439
- Leaver, Sollory v., 409, 410
 Leavers v. Clayton, 298, 306
 Le Bas v. Herbert, 658, 663
 Le Breton, Eagles v., 271, 272
 Leche v. Lord Kilmorey, 405
 Lechmere v. Earl of Carlisle, 210
 — v. Lavie, 399
 — and Lloyd, *In re*, 261, 521
 Leckey v. Watson, 131
 Le Despencer, Baroness, Bankes v.,
 599, 601
 Ledger v. Hooker, 123
 Ledward v. Hassels, 503
 Lee's Case, 582
 — Trusts, *In re*, 405
 Lee v. Alston, 426, 427
 — v. Flinn, 586
 — Goodwin v., 136
 — Graham v., 507
 — Kibbet v., 77
 — v. Lee (27 L. J. Ch. 824), 129
 — v. Lee (10 Jur. N. S. 1041),
 249, 250
 — v. Lee (1 Dr. & Sm. 85), 286
 — v. Olding, 473
 — v. Pain, 101, 122, 124, 221,
 222, 226, 249, 643
 — v. Frieaux, 513
 — Stogdon v., 514
 — v. Stone, 552
 — Vincent v., 367
 Leech v. Bates, 28
 — Kilner v., 282
 Leedham v. Patchett, 376, 416
 Leeds, Duke of, v. Earl of Anherst,
 428
 — Duchess of, Lord Lovat v.,
 157, 429, 674
 — Duke of, v. Munday, 186
 — Duke of, Osborne v., 124
 Leeming v. Sherratt, 468, 537, 552,
 557, 580
 Lees, Biddulph v., 336, 578
 — v. Ford, 524
 — Hubbard v., 77
 — v. Lees, 205
 — v. Massey, 272
 — v. Mosley, 354, 356
 Leese, *In bonis* (2 Sw. & T. 442), 41,
 81
 — *In bonis* (17 Jur. 216), 52
 — v. Knight, 616
 Leeson v. Foulis, 177
 Leetham, Gleadow v., 157
 Le Farrant v. Spencer, 164, 165
 Lefroy v. Flood, 400
 Legatt v. Sewell, 349
 Le Gay, Morris d. Andrews v., 349
 Legg, Archer v., 252
 — Maddock v., 267
 Legge v. Asgill, 159, 192
 — Bagot v. (12 W. R. 1097),
 583, 589
 — Bagot v. (2 Dr. & Sm. 259),
 666

- Leggett, Lear v., 507
 Legh, Nanfan v., 342
 Le Grice v. Finch, 116
 Leigh, *In bonis*, 47
 — Blake v., 97
 — v. Byron, 240
 — Drummond v., 243
 — Forrester v., 659, 667
 — v. Leigh (15 Ves. 100), 284
 — v. Leigh (17 B. 605), 643
 — Lutkins v., 136
 — Wight v., 580
 Leighton v. Baillie, 187
 — v. Leighton, 632
 Leitch, Hall v., 613
 Leite, Velho v., 80
 Le Jeune v. Le Jeune, 553
 Lemage v. Goodban, 41, 42
 Leman v. Bonsall, 52
 Le Marchant v. Le Marchant, 403
 Lemayne v. Stanley, 24
 Lempriere, Cuthbert v., 618
 Lemprière, London Chartered Bank
 of Australia v., 664
 — v. Martin, 172
 — v. Valpy, 197
 Lennard, Lady Teynham v., 84
 — Lady, Nevins v., 160
 — Stanley v., 580
 Leo, Davies v., 427, 428
 Leonard, *In re*; Theobald v. King,
 444
 — Galland v., 533
 — v. Earl of Sussex, 349, 598,
 601
 — Willson v., 669
 Leonino v. Leonino, 143
 Lepine, *In re*; Dowsett v. Culver,
 388, 662
 — v. Bean, 242, 570
 Lescher, Bain v., 326, 644
 Lesingham's Trusts, *In re*, 231
 Leslie v. Leslie (1. R. 6 Eq. 332), 42
 — v. Leslie (L. & G. t. Sugd.),
 152
 — v. Rothes, Earl of, 589
 — Sing v., 208, 237
 Lester, Bassil v., 490
 — v. Garland, 498
 L'Estrange, Atkinson v., 391
 — v. L'Estrange, 205, 455
 — Love v., 464
 Le Sueur v. Le Sueur, 5
 Le Tavernier, De Tastet v., 509
 Lethbridge v. Lethbridge, 173
 — Somerville v., 488
 — v. Thurlow, 631
 Lethiullier v. Tracy, 624
 Lett v. Osborne, 248
 — v. Randall (3 Sm. & G. 83; 2
 D. F. & J. 388), 413, 649
 — v. Randall (10 Sim. 112), 524
 — Stahlschmidt v., 660
 Leven and Melville, Earl of, *In bonis*,
 81
- Leventhorpe v. Ashbie, 391
 Leverington, *In bonis*, 31
 Levett, Humphreys v., 150, 154, 440
 Levy's Trusts, *In re*, 509
 Levy, Phillips v., 494
 — v. Solomon, 238
 Lewes v. Lewes, 415
 — and East Grinstead Ry. Co.,
 Peters v., 370
 Lewin, Craigie v., 3, 6, 7
 — Holyland v., 204, 642
 — v. Killey, 533
 Lewis, *In bonis* (31 L. J. P. 153), 81
 — *In bonis* (1 Sw. & T. 31), 45
 — *In re*; Foxwell v. Lewis, 215
 — v. Allenby, 318
 — v. Boetefeur, 668
 — Bowen v., 337, 338, 345, 579
 — Brompton Hospital for Con-
 sumption v., 311
 — Clifford v., 671
 — Collins v., 659, 667
 — Ellis v., 94
 — Foxwell v., 215
 — Gilbert v., 514
 — Heath v., 451, 499
 — Kirkman v., 307
 — v. Lewis (2 Phillim. 109), 53
 — v. Lewis (1. R. 11 Eq. 340), 90
 627
 — v. Lewis (18 Eq. 219), 138
 — v. Lewis (1 Cox, 162), 406
 — v. Llewellyn, 196
 — v. Mathews (8 Eq. 277), 292
 — v. Mathews (1. R. 2 Eq. 177),
 185, 513
 — v. Morris, 283
 — d. Ormond v. Waters, 336,
 523, 578
 — Plunkett v., 629
 — v. Puxley, 345
 — v. Rees, 361
 — Ricketts v., 377
 — Spink v., 286
 — v. Templer, 472, 478, 587
 — Williams v., 391
 — Wyld v., 603
 Lewthwaite, Clennell v., 653
 — v. Thompson, 343
 Ley, Foster v., 155
 — v. Ley, 675
 — Pentecost v., 110
 — Taylor v., 235, 649
 L'Herminier, *In re*; Mounsey v.
 Buston, 394
 L'Huille v. Wood, 53
 Liardet, De Garagnol v., 553
 Lichfield v. Baker, 446
 — Ulrich v., 617
 Lickorish, Good v., 407
 Liddard v. Liddard, 401
 Liddell, Barrington v., 491, 492
 — Gee v. (L. R. 2 Eq. 341), 549
 — Gee v. (35 B. 621), 630
 — Hope v., 186

- Liddiard, Smith *v.*, 265
 Liege, Thicknesse *v.*, 575
 Lifford *v.* Sparrow, 584, 557
 Lightbourne *v.* Gill, 505
 Lightbown *v.* McMyn, 16
 Lightburne, Fowler *v.*, 361
 Lightfoot *v.* Burstall, 195
 — Doe d. Roylance *v.*, 185
 Lilford, Lord, *v.* Powys Keck (No. 1)
 (30 B. 295), 174
 — Lord, *v.* Powys Keck (No. 2)
 (30 B. 300), 106
 — Lord, *v.* Powys Keck (L. R. 1
 Eq. 347), 667
 Lill *v.* Lill, 421, 557
 Lilley *v.* Hay, 303
 Limerick, Earl of, Gray *v.*, 236
 Limpus *v.* Arnold, 636
 Lincoln's, Lord, Case, 614
 Lincoln, Lady, *v.* Duke of Newcastle,
 599
 — Lady, *v.* Pelham, 235, 251
 Lindgren *v.* Lindgren, 111
 — Wilkinson *v.*, 295
 Lindo, *Re*; Askim *v.* Ferguson, 146,
 595
 — Mocatta *v.*, 564, 566
 Linton *v.* Fleetwood, 602
 Lindsay, *In bonis* (2 P. & D. 549), 12
 — *In bonis* (8 T. L. R. 507), 58
 — *Re*, 248
 — *v.* Earl of Wicklow, 143, 435
 — *v.* Ellicott, 285
 Lindsell *v.* Thacker, 186
 Lindsey *v.* Colyear, 279
 Line *v.* Hall, 487
 Lineham, Murphy *v.*, 496
 Lingon *v.* Foley, 674
 Lingwood, Creery *v.*, 533, 535
 Linley *v.* Taylor, 95, 315
 Lipscomb *v.* Lipscomb, 143
 Lisle *v.* Lisle, 76
 Lister *v.* Bradley, 464
 — Hollinrake *v.*, 503
 — *v.* Pickford, 172
 — Simpson *v.*, 444, 445
 — *v.* Smith, 12
 Liston *v.* Keegan, 300
 Little, Miller *v.*, 114
 Littledale *v.* Smeddle, 337
 Littlejohns *v.* Household, 559
 Littleton, Winn *v.*, 221
 Littlewood, Atkinson *v.*, 630, 631
 — Waite *v.*, 551
 Liverpool, Mayor of, Stevenson *v.*,
 360, 518
 Livesey *v.* Livesey (2 H. L. 419),
 233, 234
 — *v.* Livesey (3 Russ. 237), 465
 Livie, Morris *v.*, 156
 Livock, *In bonis*, 39
 Llewellyn's Trust, 443
 — Lewis *v.*, 196
 Lloyd's Estate, *Re* (2 Jur. N. S. 539),
 138
 Lloyd, *In bonis* (9 P. D. 65), 68
 — *In re* (I. R. 6 Eq. 348), 81
 — A.-G. *v.*, 617
 — Avern *v.*, 390, 480
 — Bailey *v.*, 205
 — *v.* Carew, 348
 — *v.* Carr, 449
 — *v.* Cocker, 387
 — *v.* Davies, 534
 — Harris *v.*, 238, 255, 257
 — Hume *v.*, 270
 — *v.* Jackson, 339
 — *In re* Lechmere and, 521
 — *v.* Lloyd (54 L. T. 841), 160
 — *v.* Lloyd (7 Eq. 458), 175
 — *v.* Lloyd (4 B. 231), 194
 — *v.* Lloyd (2 Sim. N. S. 255),
 298, 499
 — *v.* Lloyd (3 K. & J. 20), 461
 — *v.* Lloyd (L. R. 2 Eq. 722), 509,
 510
 — Morris *v.*, 180, 339
 — *v.* Roberts, 28
 — *v.* Tardy, 203
 — *v.* Williams, 151
 Lloyd-Graeme *v.* A.-G., 299
 Lloyd-Phillips *v.* Davis, 476
 Loch *v.* Bagley, 600
 Lock *v.* Venables, 144
 Locke *v.* Dunlop, 237, 247
 — *v.* James, 39, 44, 54
 — *v.* Lamb, 257, 468, 466
 — *v.* Nockolds, 254
 — Pierce *v.*, 626
 Lockhart, *In bonis*, 70
 — *v.* Hardy, 405, 676
 Lockley, Price *v.*, 547
 Lockton *v.* Leckton, 372
 Lockwood, Eastwood *v.*, 234, 622
 — *v.* Sikes, 507
 Lockyer, Pym *v.* (12 Sim. 394), 507
 — Pym *v.* (5 M. & C. 48), 632
 Locroft, Grute *v.*, 335
 Lodge, Baskett *v.*, 595
 Lofthouse, *In re*, 385
 Loftus, Ricketts *v.*, 639
 — *v.* Stoney, 175, 176
 Logan *v.* Bell, 75
 — Freme *v.*, 203, 261
 — MacAdam *v.*, 76
 Loman, Pearce *v.*, 667
 Lomas, A.-G. *v.*, 215
 — Williams *v.*, 663
 Lomax *v.* Holmden (1 Ves. Sen. 290),
 233
 — *v.* Holmeden (3 P. W. 176), 416
 Lombe *v.* Stoughton, 171, 490
 Lomer, Scotney *v.*, 208, 464, 465
 Londesborough, *In re*; Bridgman *v.*
 Fitzgerald, 164, 165
 — Lord, *v.* Somerville, 674
 London & South Western Ry. Co. *v.*
 Bridger, 357
 — & South Western Railway *v.*
 Gomm, 475

- London, Bishop of, Benet College v., 98, 321
 — Bishop of, Hill v., 136
 — Chartered Bank of Australia v. Lemprière, 664
 — City Mission, Anderson v., 128
 — Lord Mayor of, v. Russell, 124
 — University of, v. Yarrow, 298
 Long v. Beaumont, 277
 — v. Blackall, 287, 291
 — Carne v., 98, 296, 477
 — v. Gardner, 151
 — v. Hughes, 412
 — v. Lane, 569, 571, 572
 — Martin v., 583
 — Milsome v., 177
 — v. Ovenden, 153
 — v. Short, 118, 663
 — v. Watkinson, 292
 Longdon v. Simson, 491
 Longfield v. Bantry, 128, 233, 656
 Longford v. Purdon, 14, 22
 Longhead v. Phelps, 482
 Longlands, Gillies v., 203
 Longley v. Longley, 175
 Longman, Tiffin v., 271, 272
 Longmore v. Broom, 262, 539
 — v. Elcum, 414
 Longridge, Hawks v., 193
 — Hetherington v., 195
 Longstaff v. Rennison, 317, 318
 Longworth v. Bellamy, 229
 Lopdell, Adams v., 405
 Lopes, Hume v., 378
 Lord, Andrews v., 533, 535
 — v. Bunn, 408
 — v. Godfrey, 444
 — v. Hayward, 247
 — v. Lord, 150, 151
 — Moorhouse v., 4
 — Wightwick v., 443
 Lorimer, *Re*, 513
 Loring v. Thomas, 247, 545
 Loscombe v. Wintringham, 295, 304, 305
 Loeb, Baxter v., 612
 — Middleton v., 492
 Louch v. Peters, 156
 Lovat, Lord, v. Duchess of Leeds, 157, 429, 674
 Lovatt v. Williamson, 340
 Love, *In bonis*, 82
 — *In re*; Green v. Tribe, 647
 — v. Gaze, 401, 651
 — v. L'Estrange, 464
 — v. Love, 453
 Lovegrove, *In bonis*, 13
 Lovejoy v. Carter, 247
 — Cheese v., 44
 Loveland, Chorley v., 235
 Lovell v. Knight, 197
 Loveman, *In re*; Watson v. Watson, 128
 Low, Edmunds v., 630, 631
 Low, Phillips v., 173
 — v. Smith, 280
 Lowater, Robinson v., 374
 Lowe, *In bonis*, 81
 — *In re*; Danily v. Platt, 229, 242
 — Bennett v., 580
 — Butler v., 258, 264
 — Clayton v., 534
 — v. Davies, 352
 — Jordan v., 394
 — v. Land, 551
 — v. Manners, 502
 — v. Pennington, 206
 — v. Thomas, 153, 159
 Lowes v. Lowes, 95
 Lowndes, Cooté v., 140
 — Fox v., 314
 — Gorst v., 490
 — v. Lowndes (15 Ves. 301), 151
 — v. Lowndes (1 Y. & J. 445), 206
 — v. Norton, 429
 — v. Stone, 283
 Lowry, *In bonis*, 81
 — v. Lowry, 598
 — v. Pattison, 501
 Lowther v. Bantinck, 387
 — v. Cavendish, 452
 — Marquis of Hertford v., 165, 187
 — Suisse v., 125
 Loyd v. Roberts, 69
 Luard v. Lane, 128
 Lubbock, Clarke v., 536
 Lucan, Earl of, Belasyse v., 170
 Lucas, *In re*; Parish v. Hudson, 145
 — Will, *In re*, 545
 — v. Brandreth, 209, 281
 — v. Cuddy, 266
 — v. Goldamid, 273
 — v. Jones, 312, 313
 — Newton v., 104
 — Peacock v., 448
 — Seymour v., 509
 — Smith v., 90, 97
 — Willis v., 339
 Lucena v. Lucena, 553
 Luckcraft v. Pridham (48 L. J. Ch. 686), 662, 666, 668, 677
 Luckie, Bird v., 286
 Luckraft v. Pridham (6 Ch. D. 205), 322
 Lucraft, Doe d. Rew v., 580
 Luddy, *In re*; Peard v. Morton, 533
 Ludlam, *Re*; Ludlam v. Ludlam, 150
 — Doe d. Clarke v., 181
 Ludlow v. Bunbury, 504
 Luffingham, Espinasse v., 173
 Luffman, *In bonis*, 69
 Lugar v. Harman, 249, 390
 Luke, Tyler v., 512
 Lukin, Curtis v., 489
 Lumbell v. Lumbell, 45

- Lumley v. Robbins, 595
 — v. Scarborough, Earl of, 589
 Lush, *In bonis*, 81
 — Sharp v., 665
 Lushington v. Boldero, 428
 — v. Onslow, 34
 Lutkins v. Leigh, 136
 Lutley, Ackland v., 362
 Luxford v. Cheek, 450, 457
 Luxton, Blake v., 74
 — Doe v., 74
 Lyall v. Paton, 8
 Lyddon v. Ellison, 233
 Lyde, Doe d. Lyde v., 580
 Lye, Cruttwell v., 166
 Lyford, Doe d. Tyrrell v., 103
 — Johnson v., 47
 Lyles, Battyl v., 46
 Lyman's Trust, *Re*, 469
 Lynam's Trusts, *In re*, 317
 Lynam, Grant v., 271, 275
 Lynch, Kevil v., 24
 — v. Provisional Government of
 Paraguay, 3
 Lyne's Trust, *In re*, 229
 — Estate, *In re*; Sands v. Lyne,
 119, 662
 Lynn, Armstrong v., 637
 — v. Beaver, 654
 — v. Kerridge, 159
 Lyon's Trusts, *In re*, 226
 Lyon v. Coward, 334
 — v. Michell, 393
 — Parnell v., 501
 — Perrin v., 499
 Lyons, Mayor of, v. Bengal, Advo-
 cate-General of, 304
 Lysaght v. Edwards, 186, 216
 Lytton v. Lytton, 583, 587
 Lywood v. Kimber, 278
- MAAS v. Sheffield, 18
 Mabbett, *In re*; Pitman v. Hol-
 borrow, 411
 Maberley's Trusts, 187
 Maberley v. Strobe, 549, 571
 Maberly, Masterman v., 52, 53
 MacAdam v. Logan, 76
 McAlinden v. McAlinden, 404
 M'Ara v. M'Cay, 41, 57
 Macaulay, Wrightson v., 277
 McBean, Collier v., 348
 McCabe, *In bonis*, 40
 McCarogher v. Whieldon, 625
 M'Cartan, Dowdall v., 139
 M'Carthy, Carberry v., 610
 — v. M'Carthy, 528
 McCarthy, Mahoney v., 19
 McCausland, Rawson v., 155
 M'Cay, M'Ara v., 41, 57
 McClean v. Simpson, 608
 McClellan v. Clark, 114, 116
 M'Clenaghan v. Bankhead, 586
- McClure v. Evans, 633
 M'Conaghy, Campbell v., 670
 M'Conville v. M'Creesh, 30
 McConville, Morrow v., 174, 297, 301
 McCormick v. Grogan, 66
 M'Creesh, M'Conville v., 30
 McCraight v. McCraight, 83
 M'Culloch v. M'Culloch, 457
 McCutcheon v. Allen, 607
 Macdermot, Dolan v., 295
 McDermot v. O'Connor, 415
 M'Dermot, White v., 502
 McDermott, Gittings v., 280
 — v. Wallace, 422
 Macdonald v. Bryce (2 Kea. 276), 490
 — v. Bryce (16 B. 581), 555
 — Cooper v. (16 Eq. 258), 472,
 473, 553, 596, 633, 634
 — Cooper v. (7 Ch. D. 288), 511,
 514
 — v. Irvine, 111, 113, 119, 443,
 446
 — Kermod v., 116, 616, 619
 — v. Walker, 78
 M'Donnell, Dillon v., 158
 — v. Morrow, 162
 Macdoul, Crosbie v., 43, 59
 Macdoul, Countess of Dalhousie v.,
 4, 5, 6
 McDowall, *Ex parte*, 409
 Macdowell, Leake v., 292
 McDowell, McTear v., 397
 McEnally v. Wetherall, 337
 McFarlane, *In re*, 41
 McGrain, Campbell v., 189, 190
 McGrath, *In re*, 85
 MacGregor, *In bonis*, 61
 Macgregor v. Macgregor, 267, 269,
 328, 333, 334
 Macguire, Ashburner v., 114, 116,
 127, 129
 Machell v. Newman, 290
 — v. Weeding, 608
 Machin v. Grindell, 52
 Machu, *In re*, 505
 McHugh, Barnardo v., 84
 Macintosh, Young v., 600
 McKane, *In bonis*, 81
 McKechnie v. Vaughan, 250
 Mackell v. Winter, 612
 McKenna v. Eager, 356
 Mackenzie's Trusts, *In re*, 381
 Mackenzie v. Bradbury, 613
 — v. Childers, 475
 — v. King, 620
 — v. Mackenzie, 123
 — Sandeman v., 234
 Mackett v. Mackett, 404
 M'Key, *In bonis*, 25, 29
 Mackie v. Mackie, 444
 — Walter v., 207
 Mackillop, Coates v., 296, 319
 Mackilwain, Jones v., 464
 Mackinley v. Bates, 440
 — v. Sison, 110, 207

- Mackinnon, Arthur *v.*, 110
 — *v.* Peach, 529
 — *v.* Sewell, 528
 Mackintosh *v.* Townsend, 321
 Mackleston *v.* Brown, 654
 Mackworth *v.* Hinxman, 485
 M'Lachlan *v.* Taitt, 461, 471
 MacLae *v.* Ewing, 52, 54
 MacLaren *v.* Stainton (3 D. F. & J. 202), 144, 441
 — *v.* Stainton (27 L. J. Ch. 442), 172
 McLaughlin, *In re*, 498
 M'Laughlin, Hervey *v.*, 530
 Maclean, *Re*; Williams *v.* Nelson, 160
 Macleay, *Re*, 504
 McLeod *v.* McNab, 44, 58, 59
 Macleoth *v.* Bacon, 274
 McMahon *v.* Burchell, 133, 134
 MacMahon, Shaw *v.*, 644, 645
 M'Manus, Fee *v.*, 120, 192
 McMurdo, *In bonis*, 51, 52
 McMyn, *In re*; Lightbown *v.* McMyn, 16
 McNab, McLeod *v.*, 44, 58, 59
 MacNab *v.* Whitbread, 399
 Macnamara *v.* Dillon, 348
 McNeale, Peirce *v.*, 204
 McNeillie *v.* Acton, 382
 Maconochie, Trafford *v.*, 451, 452
 Macoubrey *v.* Jones, 235, 236
 M'Pherson, Allen *v.*, 72
 Macpherson, Collins *v.*, 563
 — *v.* Macpherson, 447
 Macreight, *In re*; Paxton *v.* Macreight, 6, 7
 McTear *v.* McDowell, 397
 McVicar, *In bonis*, 36
 McVickers' Contract, *In re*, 403
 Madden *v.* Ikin, 234, 472
 — *v.* Madden, 367
 Maddeson *v.* Chapman, 92
 Maddick *v.* Marks, 198
 Maddison *v.* Alderson, 13
 — *v.* Chapinan, 456, 457, 466
 — *v.* Pye, 666
 — Wilson *v.*, 151, 325, 413
 Maddock, *In bonis*, 24, 30
 — Allen *v.*, 62
 — *v.* Legg, 267
 Maddy *v.* Hale, 438
 Maden *v.* Taylor, 341, 553, 557, 611
 — Yates *v.*, 413
 Madge, Spiller *v.*, 644
 Maffet *v.* Wakefield, 564, 565, 566
 Maffett, Hardman *v.*, 236
 Magees, *In re*, 85
 Magga, Jones *v.*, 492, 494
 — Lawrence *v.*, 436
 Magill *v.* Murphy, 417
 Magnesi *v.* Hazelton, 45
 Magniac, Dashwood *v.*, 426
 Magrath, Matson *v.*, 56
 — *v.* Morehead, 599
 Maguire, *Re*, 305
 — Caulfield *v.*, 433
 — *v.* Dodd, 10
 Maher *v.* Maher, 152, 462
 Mahon, Dooley *v.*, 222
 — *v.* Savage, 302
 Mahon-Hagan, Bevan *v.*, 452, 503
 Mahoney *v.* McCarthy, 19
 Mahony *v.* Donovan, 187, 190
 — *v.* Duggan, 296
 Main, Patience *v.*, 8
 — Walker *v.*, 563, 564, 566
 Maine, Malden *v.*, 467
 Mainwaring *v.* Beevor, 147, 257, 258
 Maitland *v.* Adair, 639
 — *v.* Chalie, 574
 — Dewar *v.*, 96
 Major, Wilson *v.*, 399
 Makeown *v.* Ardagh, 129, 304, 305
 Makin, Walter *v.*, 291
 Making *v.* Making, 433
 Malam, *In re*; Malam *v.* Hitchins, 441, 442
 Malcolm *v.* Malcolm, 570
 — *v.* Martin, 254
 — *v.* O'Callaghan, 463, 467, 500
 — *v.* Taylor, 581
 — Von Brockdorff *v.*, 205, 208, 486
 Malcomson *v.* Malcomson, 385
 Malden *v.* Maine, 467
 Maleverer *v.* Spinks, 426
 Maley, *In bonis*, 46
 Malim *v.* Keighley, 401, 403
 Malins, *In bonis*, 69
 Malkin, A.-G. *v.*, 390
 Mallard, Ware *v.*, 403
 Malmesbury *v.* Malmesbury, 620
 Maltass *v.* Maltass, 4, 6
 Maltby, Cross *v.*, 553
 Manby, Colegrave *v.*, 131
 Manchester, Corporation of, Gee *v.*, 534
 — and Southport Ry., *Re*, 216
 Mander *v.* Harris, 230
 Mandeville's Case, 267, 278
 Mansfield *v.* Dugard, 416, 454
 Mangin *v.* Mangin, 161
 Mangles, A.-G. *v.*, 209
 — Withy *v.*, 281
 Manifold, Doe *v.*, 29
 Mann, *In bonis*, 71
 — *v.* Burlingham, 317
 — Burnett *v.*, 16
 — *v.* Copland, 118
 — Debeze *v.*, 634
 — *v.* Fuller, 126, 617
 — *v.* Knapp, 129
 — *v.* Thompson, 258
 Manners, Cocks *v.*, 98, 296, 297
 — Denton *v.*, 320
 — Lowe *v.*, 502
 — Earl, Vernon *v.*, 656
 Manning's Case, 518
 Manning, Allen *v.*, 53

- Manning v. Chambers, 509
 — Mara v., 18
 — v. Moore, 586
 — Penrose v., 241
 — v. Purcell (7 D. M. & G. 55), 158
 — v. Purcell (2 Sm. & G. 284), 164, 165
 — v. Spooner, 656, 657
 — v. Taylor, 338
 — v. Theaiger, 122
 Mannington, Hutcheon v., 568
 Manno v. Greener, 172, 340, 670
 Mansel, *In re*; Rhodes v. Jenkin, 372
 — v. Norton, 434
 Mansell v. Vaughan, 368
 Mansergh v. Campbell, 413, 414
 Mansfield v. Mansfield, 16, 19
 — Powys v., 634
 Manston, Hart v., 617
 Mantell, Cowper v., 127, 129, 406, 641
 Manton v. Tabois, 127, 128, 164
 Mapp v. Elcock, 652
 Mara v. Manning, 18
 March, *In re*; Mander v. Harris, 230
 Marchant, *In bonis*, 64
 — A.-G. v., 308
 — v. Cragg, 230
 — Parker v., 161, 188, 227
 Marcus, *Re*; Marcus v. Marcus, 100, 157, 227
 Margary v. Robinson, 26
 Margerum, Hales v., 395
 Margetson v. Hall, 547
 Margham, Martin v., 608
 Margitson, *Re*; Haggard v. Haggard, 617
 Marine Society, Symonds v., 313
 Marjoribanks v. Hovenden, 10, 11
 — Nairn v., 432
 Marker, Kekewich v., 423
 Markham v. Ivatt, 192, 289
 Marks, Churchill v., 504
 — Maddick v., 198
 Marlborough's Estates, *In re* Duke of, 436
 Marlborough, Duke of, A.-G. v., 424
 — Duke of, v. Lord Godolphin, 638
 — Duke of, Earl of Shaftesbury v., 125, 437
 Marlott, Tapner v., 279
 Marples v. Bainbridge, 500
 Marrett, *In re*; Chalmers v. Wingfield, 8
 Marriott v. Abell, 526, 559
 — Bunting v., 305, 317
 — Bussell v., 52
 — Peareth v., 157
 — Tolner v., 496
 — Venes v., 228
 Marsden, *In bonis*, 11
 — Ballard v., 134, 368
 Marsden, Eyre v., 492, 494, 536, 553, 560, 657
 — Green v., 399, 400, 514
 — v. Kent, 377
 — Newton v., 499
 Marsh, *In re*; Mason v. Thorne, 198
 — v. A.-G., 305, 313
 — v. Marsh (1 Sw. & T. 528), 23, 25, 31, 59
 — v. Marsh (1 B. C. C. 293), 272
 — v. Means, 304
 Marshall, *Ex parte*, 186
 — v. Aizlewood, 505
 — Bennett v., 224
 — v. Bousfield, 598
 — v. Bremner, 445
 — v. Crowther, 446
 — v. Gingell, 362
 — v. Hill, 574
 — v. Holloway, 479
 — Jefferys v., 369
 — v. Mason, 264
 — Uphill v., 43
 — Wright v., 589
 — *In re* Wright's Trustees and, 371
 Marshfield, Talbot v., 387
 Marson, Theakston v., 54
 — Williams v., 157
 Marston v. Doe d. Fox, 35
 — v. Roe d. Fox, 55, 56
 Martelli v. Holloway, 485, 593
 Martin, *In bonis* (1 P. & D. 380), 12
 — *In bonis* (6 N. of C. 694; 1 Rob. 712), 30
 — *Re*, 18
 — *In re*; Smith v. Martin, 456
 — *Re*; Tuke v. Gilbert, 466
 — Baker v., 415
 — v. Blake, 155
 — Chellen v., 456
 — Churcher v., 324
 — Cooper v., 76
 — Doe d. Lemprière v., 172
 — Doe d. Templeton v., 101
 — Doe d. Willis v., 473
 — Drake v., 187
 — v. Drinkwater, 124
 — v. Freeman, 305, 307, 308, 317, 320
 — Fullerton v. (22 L. J. Ch. 893), 176
 — Fullerton v. (1 Dr. & Sm. 31), 448
 — v. Glover, 188, 233
 — Greig v., 222
 — Hallett to, 380
 — v. Haynes, 409, 410
 — v. Hobson, 161
 — v. Holgate, 268, 542, 545
 — Husband v., 313
 — v. Lacon, 316
 — v. Laverton, 185
 — v. Long, 583
 — Malcolm v., 254

- Martin v. Margham**, 508
 — *v. Martin* (L. R. 1 Eq. 369), 152
 — *v. Martin* (L. R. 2 Eq. 404), 568
 — *v. Martin* ([1893] 1 Ch. 188), 666
 — **Moriarty v.**, 91
 — **Morrison v.**, 249
 — **Reynish v.**, 500, 501
 — **Smith v.**, 456
 — *v. Smyth*, 669
 — **Soames v.**, 415
 — *v. Swannell*, 344
 — **Townsend v.**, 113
 — **Turner v.**, 640
 — *v. Wellstead*, 317
 — *d. Weston v. Mowlin*, 184
 — **Young v.**, 400
Martindale, Taylor v., 410
Martineau v. Briggs, 616
 — *v. Rogers*, 462, 535
 — **Walker v.**, 412
Marwood v. Turner, 131
Mary Wood's Will, Re, 195
Masefield, Bristow v., 618
Maskell v. Farrington, 670
Maskelyne, Barclay v., 617
Mason's Will, Re, 162, 642
Mason, In re; Mason v. Mason, 490, 491
 — *In re; Mason v. Robinson*, 417
 — *v. Baker*, 249
 — *v. Clarke*, 325
 — **Hyde v.**, 38
 — **Jones v.** (55 L. T. 671), 274, 293
 — **Jones v.** (56 L. J. Ch. 600), 415
 — **Jones v.** (39 Ch. D. 634), 483
 — **Marshall v.**, 264
 — *v. Mason*, 490, 491
 — **Maugham v.**, 212, 213
 — *v. Robinson*, 417
 — *v. Thorne*, 198
 — **Trestrail v.**, 142
Masonic and General Life Assurance Co., In re, 71
Massey, Egerton v., 179
 — **Evans v.**, 242, 245
 — **Given v.**, 138, 174
 — *v. Hudson*, 585
 — **Lees v.**, 272
 — *v. Rowen*, 513, 514
Massie, Abbot v., 220
Masson, Stevenson v., 8, 632, 633
Massy v. Rogers, 389, 498
Master, Hoy v., 395, 400
Masterman, Harbin v., 493, 507
 — *v. Maberly*, 52, 53
Masters v. Hooper, 272
 — *v. Masters*, 221
 — *v. Scales*, 546
Mather v. Scott, 320
 — *v. Thomas*, 162
Matheson v. Goodwyn, 270, 448, 546
Mathews v. Foulsham, 111
 — *v. Gardiner*, 336, 574
 — *v. Keble*, 491, 492, 670
 — **Lewis v.** (L. R. 2 Eq. 177), 185, 513
 — **Lewis v.** (8 Eq. 277), 292
 — *v. Mathews* (4 Eq. 278), 171
 — *v. Mathews* (2 Ves. Sen. 635), 630
Mathias, In bonis, 61
Matson v. Magrath, 56
Matthew, Pratt v. (22 B. 239), 228, 241, 242, 245
 — **Pratt v.** (8 D. M. & G. 522), 569
Matthews' Estate, Re, 418
Matthews, Daniel v., 541
 — **Dilley v.**, 243
 — *v. Foulshaw*, 250
 — **Hoskins v.**, 7
 — *v. Paul*, 234
 — **Picken v.**, 483
 — **Powis v.**, 472
 — *v. Warner*, 54
 — *v. Windross*, 339
Mattingley's Trusts, 206
Mattison v. Tanfield, 283
Mande, Benson v., 150
 — *v. Maude*, 539
 — **Spiller v.**, 296
Maudsley, Monk v., 177
Maugham v. Mason, 212, 213
 — *v. Vincent*, 285
Maughan, Sopwith v., 94
Maule, Rogers v., 649
 — **Rutherford v.**, 52
 — **Stone v.**, 574
Maunde, Walter v., 271
Maundy v. Maundy, 171
Maunsell, Batteste v., 219
Mawbey, Hockley v., 344, 580
Maxton, Re, 274
Maxwell's Will, Re, 395
Maxwell, Ellis v., 491, 494
 — *v. Hyslop*, 96, 140
 — *v. Maxwell* (16 B. 106; 2 D. M. & G. 705), 96
 — *v. Maxwell* (I. R. 2 Eq. 478), 292, 641
 — *v. Maxwell* (L. R. 4 H. L. 506), 669
May, In bonis, 58
 — *v. Bennett*, 416
 — *v. Grove*, 161
 — **Hall v.**, 78
 — **Hatton v.**, 411
 — *v. May*, 172
 — *v. Potter*, 152
 — *v. Street*, 649
Maybank v. Brooks, 638
Maybery v. Brooking, 163
Maybury, Bird v., 464
Mayd, In bonis, 12
 — *v. Field*, 17, 19, 627, 664

- Mayer v. Townshend, 397
 Mayhew, *In re*; Rowles v. Mayhew, 666
 Mayn v. Mayn, 333
 Maynard, Leacroft v., 125
 — v. Wright, 620
 Mayne, Bayle v., 54
 — Williams v., 90
 — v. Woodward, 122, 125
 Mayott v. Mayott, 266
 Mazarine, Deerly v., 18
 Meacher v. Young, 386
 Mead, Lord Beauclerk v., 616
 — Garland v., 74, 181
 — O'Neil v., 663
 Meade's Trusts, *In re*, 269
 Meade v. Hide, 676
 Meadows v. Parry, 527
 Meads, Taylor v., 17, 77, 511
 Meagher, Barden v., 413, 414
 Means, Marsh v., 304
 Measure v. Gee, 349
 Medcraft, Hone v., 131
 Medley, Cundy v., 54
 — v. Horton, 517
 — Wood v., 62
 Medlock, *In re*; Ruffle v. Medlock, 153
 Medworth v. Pope, 238, 245
 Mee, Badham v., 414
 Meech, Bentley v., 573
 Meeds v. Wood, 451, 457
 Megson v. Hindle, 243
 Meinertzen v. Walters, 632
 Mekin, Hyett v., 219
 Mellick v. Asylum, President of the, 298
 Melling, R. v., 348, 354
 Mellish, Arrow v., 253
 — Devisme v., 271
 — v. Mellish, 345
 — v. Vallina, 140
 Mello, Widgen v., 543
 Mellor, *In re*; *Ex parte* Butcher, 382, 384
 — v. Daintree, 622
 — Stead v., 398
 Melsom v. Awdry, 536
 — v. Giles, 536
 — Giles v., 594
 Meluish v. Milton, 72
 Melville, Preston v., 3, 441
 Mence v. Mence, 653
 Mendham, Morley v., 444
 — v. Williams, 564, 565
 Menteith v. Campbell, 17, 18, 19
 Menton, Crowe v., 127, 216
 Mercer, *In bonis*, 61
 Merceron's Trusts, *In re*; Davies v. Merceron, 581
 Mercers' Co. v. A.-G., 309
 Merchant Taylors v. A.-G., 308
 — A.-G. v., 401, 450
 — Tyler v., 33
 Meredith's Trusts, *In re*, 191
 Meredith, *In bonis*, 42
 — v. Farr, 238, 242
 — v. Heneage, 400
 — v. Meredith, 353
 — Trappes v., 509
 — v. Treffry, 233
 — Woodhouse v., 184
 Meredyth v. Meredyth, 200
 Merest v. James, 355
 Merlin v. Blagrave, 482
 Merrick's Trusts, 546
 Merrick, Wakeham v., 414
 Merrill v. Morton, 265
 Merritt, *In bonis*, 42
 — Perry v., 505, 519
 — Powell v., 650
 Merry v. Hill, 462, 465
 Mertens v. Walley, 231
 Mervin, *In re*; Mervin v. Crossman, 258, 466, 483
 Messeena v. Carr, 411
 Messenger, Middleton v., 255
 Metcalfe v. Hutchinson, 674
 — v. Metcalfe, 505, 509, 510
 Metham v. Duke of Devon, 242, 244, 245
 Methuen and Blore's Contract, *In re*, 168
 Mette's Estate, *In re*, 449
 Meure v. Meure, 598
 Meux, Baggett v., 514, 515, 516
 Meyer, Duke of Ancaster v., 136
 — Booth v., 495
 — v. Simonsen, 443, 447
 — v. Townshend, 641
 Meyrick, Duchess of Cleveland v., 164
 — Garth v., 223
 — v. Laws, 589
 Miall v. Brane, 94
 Michael's Trusts, *In re* (46 L. J. Ch. 651), 477
 Michel's Trusts, *In re* (28 B. 39) 299
 Michell v. Bridges, 287
 — Jefferies v., 223, 631
 — Lyon v., 393
 — v. Michell, 188, 678
 — Onalow v., 629
 — Quested v., 279
 — v. Wilton, 417
 Micklethwait, Astley v., 261, 521, 663
 — v. Micklethwait, 425, 589
 Mico, Haynes v., 630
 Micou, Lamar v., 5
 Middlehurst, Hart v., 601
 Middlesex Hospital, Kerr v., 413
 Middleton, *In bonis* (33 L. J. P. 16), 30
 — *In bonis* (3 Sw. & T. 583), 37, 38
 — *In re*; Thompson v. Harris, 665
 — Abbott v., 622

- Middleton v. Clitheroe**, 320
 — **Colville v.**, 118, 675
 — **Crofts v.**, 348
 — **Cust v.**, 170
 — **Early v.**, 122, 248
 — **v. Loah**, 492
 — **v. Messenger**, 255
 — **v. Middleton**, 136
 — **v. Pollock**; *Ex parte* Nugee, 134
 — **v. Spicer**, 652
 — **Willoughby v.**, 97
 — **v. Windross**, 89
Midgley, Craig v., 564
 — **v. Tatley**, 480
Midland Railway Co., In re, 105, 106
 — **Steele v.**, 171
Milbank v. Vane, 506
Mildmay, Selwood v., 111
Miles' Contract, In re Tweedie and, 371
Miles, Re; **Miles v. Miles**, 541
 — **v. Dyer**, 573
 — **Goodtitle d. Daniel v.**, 180
 — **v. Harford**, 482, 599
 — **v. Harrison**, 665, 668
 — **v. Jarvis**, 261
 — **v. Miles (L. R. 1 Eq. 462)**, 131
 — **v. Miles (61 L. T. 359)**, 541
Mill's Trusts, In re, 184
Mill, A.-G. v., 320
 — **v. Hill**, 436
 — **Hill v.**, 436
 — **v. Mill**, 327
Millar v. Woodside, 111
Millard v. Bailey, 102, 109, 113
Millechamp, Re, 441
Milledge, Smith v., 240
Miller, In bonis, 70
 — **Re**; **Daniel v. Daniel**, 185
 — **Abney v.**, 131
 — **v. Chapman**, 589
 — **v. Harris**, 84
 — **v. Huddleston (6 Eq. 65)**, 120, 121
 — **v. Huddleston (3 Mac. & G. 513)**, 417, 659, 660
 — **v. James**, 70
 — **v. Little**, 114
 — **v. Miller**, 429, 444
 — **Paris v.**, 338
 — **Parsons v.**, 658, 667, 672
 — **v. Stanley**, 593
 — **v. Thurgood**, 93
 — **v. Travers**, 109
 — **West v.**, 565
 — **v. Wheatley**, 498
Milligan, In bonis, 51
Millikin v. Snelling, 126, 519
Milliner v. Robinson, 345
Millington, Torrens v., 193, 194
Mills, In re; **Mills v. Mills**, 195, 204
Mills, Alexander v., 368
 — **v. Brown**, 120
 — **v. Drewitt**, 416
 — **v. Farmer**, 303
 — **Farmer v.**, 662
 — **Hamilton v.**, 279
 — **Howarth v.**, 245
 — **v. Jarvis**, 521
 — **Joel v.**, 422
 — **v. Johnston**, 406
 — **v. Mills (34 Ch. D. 186)**, 195, 204
 — **v. Mills (7 Sim. 501)**, 445
 — **v. Millward**, 36
 — **v. Norris**, 147, 148
 — **v. Roberts**, 153
 — **v. Seward**, 350
 — **Vivian v.**, 467
Milltown, Earl of, v. French, 150
Millward, Mills v., 36
Milman, Morgan v., 435
Milne, Re; **Grant v. Heysham**, 472
 — **v. Gilbert**, 282
 — **Travis v.**, 382
 — **Walker v.**, 314, 315
 — **v. Wood**, 240
Milner, A.-G. v., 645
 — **v. Milner**, 513
 — **Slade v.**, 530
Milnes v. Aked, 253
 — **v. Foden**, 10
 — **v. Slater**, 652, 654, 657, 675
Milroy v. Milroy, 466
Milsom v. Awdrey, 594
Milsome v. Long, 177
Milton, Meluish v., 72
Miner v. Baldwin, 412, 416
Minet, Hatfield v., 632
Minnethorpe, Gray v., 678
Minors v. Battison, 211, 567, 568
Minshull, Bernard v., 192, 398, 399
 — **v. Minshull**, 349, 353
Minter v. Wraith, 287
Minton v. Minton, 422
Mirehouse, Cooke v., 572
 — **v. Scaife**, 659
Miakelly, In bonis, 13, 68
Mitchell's Estate, In re; **Mitchell v. Moberly**, 315
Mitchell, In re; *Ex parte* Cunningham, 6
 — **Emsley v.**, 316
 — **v. Gard**, 23, 72
 — **Jones v.**, 212
 — **v. Mitchell**, 54
 — **v. Moberly**, 315
 — **Picard v.**, 416
 — **Romans v.**, 294
 — **Whitby v.**, 476
 — **Williams v.**, 198
Mitcheson, In bonis, 37
Mitford, Pybus v., 347
 — **v. Reynolds**, 307
 — **Whicker v.**, 249

- Moase v. White, 176
 Moberly, Mitchell v., 315
 Mocatta v. Mocatta, 172
 — v. Lindo, 564, 566
 Mockett, Breton v., 518
 Moffat v. Burnie, 248, 420
 Moffett v. Bates, 88
 Mogg v. Mogg, 260, 267
 — Taylor v., 656
 Moggridge v. Thackwell (1 Ves. Jun. 473), 124
 — v. Thackwell (7 Ves. 36), 304, 310
 Moir's Trusts, *In re*, 76
 Moir, *In re*; Warner v. Moir, 503
 — Warner v., 503
 Mold, Rodhouse v., 142
 Mole v. Mole, 152
 Molesworth, Darrel v., 528
 Mollard, Bagley v., 238, 243, 244
 Molony v. Kennedy, 512
 Molyneux's Estate, *In re*, 512, 516
 Molyneux and White, *In re*, 375
 Monck, Broome v., 218
 — v. Monck, 129, 634
 Monckton, Glover v., 583
 Money's Trusts, *In re*, 439
 Monk v. Maudsley, 177
 — Peacocke v., 11
 — Van Straubenzee v., 61
 Monkhouse v. Monkhouse, 573
 Monroe, Neilson v., 547
 — Styth v., 290
 Monroe v. Coutts, 54
 Monsell v. Armstrong, 367
 Montagu v. Lord Inchiquin, 599
 — v. Nucella, 541
 — v. Sandwich, Earl of (33 B. 324), 160
 — v. Earl of Sandwich (32 Ch. D. 525), 628
 Montague, Bernard v., 569
 — Elton v., 151
 Montefiore v. Enthoven, 509
 — v. Yuedella, 632
 — v. Montefiore, 52, 54
 Montford, Lord, v. Lord Cadogan, 436, 437
 Montfort, Lord, Gibson v., 674
 Montgomerie v. Woodley, 454
 Montgomery, *In bonis*, 11, 81
 — Elliot v., 671
 — v. Montgomery, 355, 356
 Monypenny v. Bristow, 107
 — v. Dering, 476, 482, 487, 488, 523, 589, 608
 Moody, *In re*; Woodroffe v. Moody, 152
 — v. Penfold, 358, 650
 — Woodroffe v., 152
 Moon, *In re*; *Ex parte* Dawson, 507, 508
 — Harley v., 120
 Mooney, Donohoe v., 525
 Moor v. Denn d. Mellor, 339
 Moor v. Raisbeck, 132, 247, 614
 — Turner v., 529
 Moore's Estate, *In re*, 417
 — Settlement Trusts, *Re*, 332
 Moore, *In bonis*, 23
 — *In re*; Moore v. Johnson, 448
 — *In re*; Moore v. Roche, 399
 — *In re*; Trafford v. Maconochie, 451, 452
 — v. Bailey, 547
 — v. Budd, 6
 — Burke v., 24, 28
 — v. Cleghorn, 340
 — v. Dixon, 666
 — Doe d. Hunt v., 454
 — Fisher v., 557
 — v. Ffolliott (19 L. R. Ir. 499), 263
 — v. Ffolliott (11 L. R. Ir. 206), 520
 — Friswell v., 52
 — v. Johnson, 448
 — Johnston v., 444
 — v. King, 26
 — Manning v., 586
 — v. Moore (1 R. 6 Eq. 166), 32
 — v. Moore (29 B. 496), 129
 — v. Moore (1 D. J. & S. 602), 140
 — v. Moore (1 B. C. C. 127), 165
 — v. Moore (1 Coll. 54), 517
 — v. Roche, 399
 — Sale v., 399
 — Scott v., 193
 — v. Simkin, 277, 279
 — Tennyson v., 236
 — v. Webster, 512
 — West v., 166
 — Whatford v., 469
 — v. Whittle, 673
 — Williamson v., 265
 Moorhouse, Hardaker v., 368
 — v. Lord, 4
 — Yarnold v., 509
 Moorsom v. Tate, 406
 Moran, Lord Talbot de Malahide v., 382
 Mordaunt v. Hussey, 653
 Morehead, Magrath v., 599
 More-Smyth v. Mountcashell, 651
 Mores' Trust, 126
 Moreton, Boughay v., 46
 — v. Fossick, 179, 180
 — v. Hughes, 541, 641, 643
 — v. Smith, 142
 Morgan's Trusts, *Re* (2 W. R. 439), 292
 Morgan, *In bonis*, 10, 11, 80
 — *Ex parte* (10 Ves. 100), 186
 — *In re*; Morgan v. Morgan, 394, 413
 — *In re*; Pillgrem v. Pillgrem, 382

- Morgan, Baxter v.**, 222
 — **Boys v.**, 192
 — **v. Britten**, 328
 — **Chetwynd v.**, 16
 — **Davies v.**, 116
 — **Doe d. Morgan v.**, 222, 223, 224
 — **Fairfield v.**, 572
 — **Gatenby v.**, 526
 — **v. Gronow**, 486
 — **Harcourt v.**, 110
 — **v. Hatchell**, 83
 — **Hurry v.**, 551
 — **Jones v. (1 B. C. C. 206)**, 343, 435
 — **Jones v. (Fearne, App. 577)**, 587
 — **v. Milman**, 435
 — **v. Morgan (1 Cr. & M. 235)**, 222, 223, 224
 — **v. Morgan (10 Eq. 99)**, 337
 — **v. Morgan ([1893] 3 Ch. 222)**, 394, 413
 — **v. Morgan (4 De G. & S. 164)**, 463, 492, 494
 — **Ogle v.**, 223
 — **Powell v.**, 500
 — **Rickman v.**, 628
 — **Rowland v.**, 592
 — **v. Thomas (6 Ch. D. 176)**, 129
 — **v. Thomas (9 Q. B. D. 643)**, 269, 355
Moriarty v. Martin, 91
Morice v. Bishop of Durham, 298, 306
Morland, Kavanagh v., 355
 — **Waite v.**, 189
Morley's Trusts, In re (25 W. R. 825), 287
 — **Will (10 Ha. 293)**, 186
Morley, Ex parte (8 Ch. 1026), 384
 — **In re; Morley v. Saunders**, 433
 — **v. Bird**, 114
 — **v. Croxon**, 318
 — **v. Mendham**, 444
 — **Nash v.**, 301
 — **v. Saunders**, 433
 — **v. Rennoldson**, 498
 — **v. Tunstall**, 657
 — **Wilson v.**, 163
Morony, In re, 621
Morrall v. Sutton, 617
Morrell v. Fisher (4 Eq. 591), 103
 — **v. Fisher (4 De G. & S. 422)**, 665
 — **v. Gissing**, 558
 — **v. Morrell (7 P. D. 68)**, 23
 — **v. Morrell (1 Hagg. 51)**, 51, 52
Morret, Blower v., 660
Morrice v. Aylmer, 164
 — **v. Langham**, 590
Morrieson, In re; Hitchins v. Morrieson, 229
Morrin v. Morrin, 399
Morris, In re, 563
 — **In re; Morris v. Atherden**, 167
 — **In re; Salter v. A.-G.**, 466
 — **d. Andrews v. Le Gay**, 349
 — **v. Atherden**, 167
 — **Broadhurst v.**, 345
 — **v. Burton**, 156
 — **v. Debenham**, 370
 — **Viscount Downe v.**, 649
 — **Magistrates of Dundee v.**, 307, 623
 — **Ekins v.**, 163
 — **Fryer v.**, 129
 — **v. Glyn**, 314
 — **v. Griffiths**, 210
 — **v. Hodges**, 439
 — **Jenkins v.**, 14
 — **Jenner v.**, 439
 — **Lewis v.**, 283
 — **v. Livie**, 156
 — **v. Lloyd**, 180, 339
 — **v. Morris (1. R. 6 C. L. 73)**, 219
 — **v. Morris (3 De G. & J. 323)**, 425
 — **v. Morris (15 Sim. 505)**, 428
 — **v. Morris (4 Dr. 33)**, 516
 — **v. Morris (17 B. 198)**, 572, 577, 583
 — **Venables v.**, 361, 598
Morrison v. Hoppe, 176
 — **v. Martin**, 249
Morrow v. Bush, 675
 — **v. M'Conville**, 174, 297, 301
 — **M'Donnell v.**, 162
Morse v. Morse, 328
 — **Nathan v.**, 53
 — **v. Tucker**, 669
Mortimer, In re; Griffiths v. Mortimer, 558
 — **v. Hartley**, 284, 573
 — **v. West (2 Sim. 274)**, 54, 488
 — **v. West (3 Russ. 370)**, 238
Mortimore v. Mortimore, 288
Mortlock's Trusts, In re, 76, 395, 505
Mortlock, Peterborough, Bishop of, 113
 — **Vivian v.**, 121
Morton, In bonis (12 P. D. 141), 45
 — **In bonis (33 L. J. P. 87)**, 67
 — **and Hallett, In re**, 78, 368
 — **Merrill v.**, 265
 — **Peard v.**, 533
 — **Richardson v.**, 671
Moseley, D'Almaine v., 176
 — **Pearks v.**, 484
Moaley, Baker v., 400
 — **v. Hide**, 365
 — **Lees v.**, 354, 356
Moas, Alty v., 557

- Moss v. Cooper, 64, 65
 — v. Dunlop, 286
 — v. Harter, 199
 — Packman v., 185
 Mostert, Denysen v., 13
 Mostin, Field v., 631
 Mostyn v. Brunton, 464
 — v. Champneys, 179
 — v. Lancaster, 376
 — v. Mostyn, 220
 Motley, Andrew v., 44
 Mott, Cherry v., 305
 Motteux, Durour v., 212
 Mottram, *Re*, 454
 Moulson v. Moulson, 625
 Mounsey v. Blamire, 277, 279, 280
 — v. Buston, 394
 Mount, Burton v., 444
 — Wilson v., 469, 471
 Mountcashell, More-Smyth v., 651
 Mountfield, Sherratt v., 265
 Mousley, Grealey v., 75
 Mowbray, Rayner v., 272, 287
 Mower's Trusts, *In re*, 666
 Mower v. Orr, 209, 364, 643
 — Walker v., 461, 468, 581
 Mowlem's Trust, 145
 Mowlin, Martin d. Weston v., 184
 Moxom, Sibthorp v., 639
 Moyle's Estate, *In re*, 346
 Moysey, Ripley v., 665
 Mudge v. Adams, 19
 Muffett, *Re*; Jones v. Mason, 274,
 293, 415, 433
 Muggeridge, *Re*, 509, 510
 Mulgrave, Lord, Phipps v., 577
 Mullally v. Walsh, 187, 188
 — v. Welsh, 175
 Mullen v. Bowman, 401
 Mullineux, Turner v., 156, 157
 Mullings, Barwick v., 12, 54
 Mullins v. Smith, 114, 168, 189
 Mulqueen's Trusts, *In re*, 274, 386
 Mumford, Gude v., 156
 — Rickards v., 46
 Munby, A.-G. v., 321
 — v. Ross, 486
 Munday, Harper v., 136, 674
 — Duke of Leeds v., 186
 Mundy, *In bonis*, 11
 — Church v., 180
 — v. Earl Howe, 386
 — Weddell v., 573
 Munkittrick, Ridgeway v., 269
 Munn, Ashworth v. (15 Ch. D. 563),
 312, 313
 — Ashworth v. (34 Ch. D. 391),
 668, 679
 Munro v. Munro, 4, 6
 — Neilson v., 280
 Munroe v. Douglas, 6, 9
 Munt v. Glynes, 599
 Munton, Byam v., 212
 Murch, West of England Bank v.,
 377, 378
 Murdoch, Fraser v., 388, 389
 Murfett v. Smith, 14
 Murkin v. Phillipson, 468
 Murphy, *In bonis*, 30
 — v. Cheevers, 308
 — Creagh v., 400
 — v. Donegan, 287
 — v. Donnelly, 178
 — v. Doyle, 162, 379
 — v. Johnston, 345
 — v. Lineham, 496
 — Magill v., 417
 Murray v. Addenbrook, 576, 584
 — Marquis Camden v., 371
 — v. Johnstone, 615
 Murrell, Hartland v., 671, 672
 — Williams v., 147
 Murthwaite v. Jenkinson, 359
 Muschamp v. Bluett, 504
 Musgrave v. Brooke, 506
 Muskett v. Eaton, 455
 Mussoorie Bank v. Raynor, 399
 Must v. Sutcliffe, 53
 Musther, *In re*; Groves v. Musther,
 544
 Muswell Hill Land Co., Rhodes v.,
 498
 Mutch, Rogers v., 258
 Museen, Frank v., 508
 — Wormald v., 418
 Myers v. Perigal, 314
 Mytton v. Mytton, 116
 NAIRN v. Marjoribanks, 432
 Nanfan v. Legh, 342
 Napier, A.-G. v., 7
 — v. Napier, 196
 Napper v. Sanders, 522
 Nash's Trusts, *In re*, 397
 Nash, *Re*; Prall v. Bevan, 271, 272,
 286
 — v. Allen, 600
 — v. Coates, 349
 — Hardacre v., 167
 — v. Morley, 301
 — Reg. v., 84
 — Swift v., 54
 Nathan v. Morse, 53
 National Provincial Bank of Eng-
 land v. Crosswell, 663, 673
 Nawab Nazim of Bengal's Infants;
 Re Ullee, 83, 84
 Naylor v. Arnitt, 379
 — Christopherson v., 544
 — Harrison v., 598
 — v. Robson, 555
 — Williamson v., 640
 Nazer, Wade v., 43
 Neale, Hobgen v., 267, 270, 541,
 542, 546, 548
 Neame, Hammond v., 404
 Neary's Estate, *In re*, 458, 529
 Neate v. Pickard, 58

Neathway v. Read, 554, 555
 Neave's Estate, *In re*, 369
 Needham, *In re*; Robinson v. Need-
 ham, 679
 — Coates v., 416
 — Donovan v., 152
 — Newland, Cursham v., 536
 Needs, Doe d. Gord v., 223, 224
 Neeld v. Neeld, 226
 Neighbour v. Thurlow, 420, 608
 Neil, *Re*; Hemming v. Neil, 407,
 408
 Neild, Plumbe v., 441
 Neilson v. Monro, 280, 547
 Nelly's Trusts, *In re*, 597
 Nelligan, Nowlan v., 530
 Nelms, Anstee v., 101
 Nelson, *In bonis*, 46
 — *In re*, 34, 39
 — v. Callow, 479
 — v. Carter, 114, 117
 — v. Hopkins, 171
 — v. Page, 138, 141
 — v. Robins, 156
 — Stoddart v., 266
 — Williams v., 160
 Nenny, Langham v., 196
 Nepean, Antrobus v., 54
 Nesbett v. Lander, 139
 Nethercote v. Bartle, 180
 Nethersole v. School for Indigent
 Blind, 322
 Netherwood, Wright v., 56
 Nettlefold's Trusts, *In re*, 387
 Nettleton v. Stephenson (18 L. J.
 Ch. 191), 281
 — v. Stevenson (3 De G. & S.
 366), 494
 Nevila, Doe d. Snape v., 618
 Nevill, *In re*; Robinson v. Nevill,
 141
 — v. Boddam, 40, 553, 557, 616
 — v. Nevill, 405
 — Robinson v., 141
 Neville, Shaw v., 28
 — v. Thacker, 604
 Neville, *In re*, 85
 — v. Drysdale, 633
 — Fenton v., 406, 651
 Nevinson v. Lennard, Lady, 160
 New v. Bonaker, 310
 Newbald v. Beckitt, 450
 Newbegin v. Bell, 656
 Newberry's Trusts, *In re*, 215
 Newberry, Starr v., 286
 Newbery, Burton v., 60, 63
 Newbold v. Roadknight, 117
 Newbolt, Pryce v., 226
 Newbould's Contract, *In re* Tippet's
 and, 515
 Newburgh v. Newburgh, 621
 Newcastle, Duke of, Lady Lincoln v.,
 599
 — Duke of, v. Vane, 427
 Newcombe, Vincent v., 444

Newcome, Turvin v., 479
 Newdigate v. Newdigate, 425
 Newell, Doe d. Roake v., 454
 — Palmer v., 202
 Newill v. Newill, 325, 404
 Newington, Delves v., 660
 Newland, Cursham v., 536
 — v. Shephard, 607
 — Tribe v., 556
 Newman, *In bonis*, 29
 — Abrey v., 253
 — Avis v., 430
 — v. Bateson, 151
 — Jones v., 223
 — Machell v., 290
 — v. Newman, 158, 187
 — v. Nightingale, 326
 — v. Piercey, 250
 — v. Wilson, 140
 Newmarch, *In re*; Newmarch v.
 Storr, 141, 142
 Newns, *In bonis*, 11
 Newsom's Trusts, 327
 Newsome v. Bowyer, 18
 Newstead v. Johnson, 654
 Newton's Trusts, *In re*, 280
 Newton v. Chapman, 389
 — v. Clarke, 29
 — Harris v., 281, 397
 — v. Lucas, 104
 — v. Marsden, 499
 — v. Newton, 43, 59
 — Ridge v., 109, 161
 — v. Taylor, 103
 — Warren v., 168
 — Wingfield v., 193
 Niblock v. Garrett, 229
 Nicholl, Wigg v., 668
 Nicholls, Cooney v., 167
 — Doe d. Player v., 360
 — v. Hawkes, 412
 — Hosking v., 113, 114
 — v. Nicholls, 12
 Nichols, Binns v., 667
 — v. Haviland, 282, 640
 — v. Hooper, 584
 Nicholson's Estate, *In re*, 412
 Nicholson, Hartshorne v., 318
 — v. Nicholson, 441
 — Stockdale v., 291
 — v. Wilson, 291
 Nickisson v. Cockill, 660, 668
 Nicks, *In bonis*, 69
 Nickson, Parker v., 277
 Nicolson v. Wordsworth, 365
 Nicolay, Jones v., 11
 Nicolson v. Kirk, 247
 Nield v. Boyd, 487
 Nightingale, Barnacle v., 578
 — v. Goulbourne, 295
 — v. Lawson, 436, 438
 — Newnan v., 326
 Nixon v. Cameron, 382, 670
 — Richardson v., 410
 — v. Sheldon, 444

- Nixon v. Verry, 509
 Noble, *Bessant v.*, 679
 — *v. Bolton*, 358, 360
 — *Gallini v.*, 110
 — *Jackson v.*, 525
 — *v. Willock*, 18
 — *Willock v.*, 16, 18, 19
 Nockolds v. Locke, 254
 Noden, *Cordell v.*, 117
 Noel v. Lord Henley, 678
 — *v. Noel*, 675, 679
 Norbury, *In re*, 84
 Norcutt v. Gordon, 660
 Norman's Trusts, 285
 Norman v. Kynaston, 397
 — *v. Norman*, 262
 Norreys v. Franks, 130, 212
 Norrington, *In re*; *Brindley v. Part-
ridge*, 377
 Norris, *Re*, 371
 — *In re*; *Allen v. Norris*, 372
 — *Allen v.*, 372
 — *v. Chambres*, 20
 — *Mills v.*, 147, 148
 — *v. Norris*, 130
 North, *Chalmers v.*, 238
 — *Hand v.*, 332
 — *Kidd v.*, 123
 — *Price v.*, 671
 — *Lord, v. Purdon*, 653
 — *Wadley v.*, 464
 North British & Mercantile Assurance
Co., *Greenhill v.*, 90
 Northcote, *Incedon v.*, 152
 — *Skrymsher v.*, 194
 Northern's Estate, *In re*; *Salt v. Pym*,
620
 Northern, *Durham v.*, 61
 Northey v. Paxton, 165
 North Staffordshire Ry., *Earl of
Shrewsbury v.*, 436
 Northumberland, *Duke of, A.-G. v.*,
302
 — *Duke of, Jervoise v.*, 598
 Norton v. Bazett, 29
 — *Davis v.*, 524
 — *v. Johnstone*, 491
 — *Lowndes v.*, 429
 — *Mansel v.*, 434
 — *Rippon v.*, 407
 — *Simmons v.*, 426
 Norwood, *Crump d. Woolley v.*, 350
 Nosworthy, *In bonis*, 12
 Noton, *Slatter v.*, 131
 Nott's Trusts, *Re*, 253
 Nottage v. Buxton, 471
 Nottidge, *Shepherd v.*, 400
 Nottley v. Palmer, 94
 Nourse v. Finch, 653
 Nowell, *Beaver v.*, 844, 393, 612
 Nowlan v. Nelligan, 530
 — *v. Walsh*, 395
 Noyce, *In re*; *Brown v. Rigg*, 564
 Noyes, *Knapp v.*, 536
 Nucella, *Montagu v.*, 541
 Nugee, *Ex parte*; *Middleton v.
Pollock*, 134
 — *v. Chapman*, 188, 635
 Nugent, *Lord, Clayton v.*, 102, 221
 — *Heath v.*, 660
 — *v. Nugent*, 613
 Nunn's Trusts, 226
 Nurton, *Buck d. Whalley v.*, 172

 OAKES v. Oakes, 123, 164
 — *Rede v.*, 370
 — *Smith v.*, 420
 Oakley, *Sherratt v.*, 613
 — *v. Wood*, 332
 Oakman, *Hetherington v.*, 472
 Oates v. Cooke, 357
 — *d. Hatterly v. Jackson*, 326,
346
 Oatley, *Hayes v.*, 202
 Obert v. Barrow, 298, 307
 O'Brien v. O'Brien, 425
 — *v. Tyssen*, 322
 O'Callaghan, *Malcolm v.*, 463, 467, 500
 Occleston v. Fullalove, 245, 246
 Oceanic Steam Navigation Co. v.
Sutherland, 380
 O'Connor, *In re*, 42
 — *v. Haslam*, 669
 O'Connor, *M'Dermot v.*, 415
 Oddie v. Brown, 479, 657
 — *v. Woodford*, 277
 Odell v. Crone, 255
 — *Crone v.*, 260, 262, 617
 — *Fowler v.*, 331, 430
 Odling, *Poole v.*, 92
 Odium v. Thompson, 432
 O'Donnell v. O'Donnell, 102
 O'Donohoe v. King, 585
 O'Dwyer v. Geare, 67, 68
 O'Ferrall v. O'Ferrall, 436
 Offen v. Harman, 379
 Oglander, *Glynn v.*, 11
 — *Harmood v.*, 657
 — *Hood v.*, 504
 Ogle v. Corthorn, 326, 328
 — *Jones v.*, 144, 145
 — *v. Knipe*, 158, 162
 — *v. Morgan*, 223
 — *v. Sherborne, Lord*, 227, 234
 — *Skinner v.*, 60
 O'Halloran v. King, 515, 516
 O'Hara v. Chainé, 95
 O'Hea v. Slattery, 260, 328
 Oke v. Heath, 191, 641
 Oland's Case, 431
 Old's Trusts, *Re*; *Pengelly v. Her-
bert*, 199
 Old, *Tickner v.*, 377
 Oldfield, *Bentley v.*, 338
 Oldham v. Oldham, 509
 Olding, *In bonis*, 26
 — *Lee v.*, 473
 Oldman v. Slater, 653
 O'Leary v. Douglass, 41

TABLE OF CASES.

xcvii

- O'Leary, Wilson v. (12 Eq. 525; 7 Ch. 448), 122, 125
 — Wilson v. (17 Eq. 419), 659
 Olivant v. Wright (1 Ch. D. 346), 533
 — v. Wright (9 Ch. D. 646), 337
 Olive, *In re*; Olive v. Westerman, 150
 Oliveira, Beaumont v., 295, 668
 Oliver, *Re*; Newbald v. Beckitt, 450
 — Hixon v., 395
 — v. Oliver (11 Eq. 506), 114
 — v. Oliver (10 Ch. D. 765), 600
 — Sloper v., 133
 — Smith v., 320
 — Massey, Dawson v., 496, 502
 Ollatt, Paske v., 21
 Ollive, Weale v., 394, 395
 Olney v. Bates, 472, 642
 O'Mahoney v. Burdett, 525, 532
 Ommaney v. Bingham, 6
 — v. Butcher, 158, 192, 299, 306, 654
 — Butler v., 393, 544
 — Robinson v., 13
 O'Neil v. Mead, 663
 O'Neill, Donnellan v., 126, 303
 — Johnson v., 153
 Ong Cheng Neo, Yeap Cheah Neo v., 275, 294, 298, 301, 406, 477, 652
 Ongley v. Chambers, 172
 Onions v. Tyrer, 37, 38, 46, 616
 Onalow, *In re*; Plowden v. Gayford, 396
 — Allardice v., 8
 — Lushington v., 84
 — v. Michell, 629
 — Romaine v., 626
 — v. Wallis, 650
 Oppenheim v. Henry, 257
 — v. Schweder, 660
 Orange v. Pickford, 77
 Ord, *In re*; Dickinson v. Dickinson, 106, 415
 — v. Ord, 595
 Ordish, Wood v., 657
 O'Reilly, Coote v., 434
 Orford v. Hart, 358
 — Earl of, Walpole, Lord, v., 13, 42, 58
 Orlebar's Settlement, *Re*, 471
 Ormerod, Paton v., 192, 193, 613
 — v. Riley, 526
 Ormond v. Kynnersley, 428
 — v. Waters, 336, 578
 Orpen, *In re*; Bewick v. Orpen, 133
 — Palmer v., 472
 Orr, Mower v., 209, 364, 643
 — West v., 544
 Orr-Ewing, Ewing v., 4
 Orrell v. Orrell, 96
 Orrery, Lord, Sheffield v., 451, 457
 Orton's Trust, *In re*, 252, 545
 Osborn v. Brown, 536
 Osborne, Hoare v. (12 W. R. 397), 645
 — Hoare v. (12 W. R. 661; 33 L. J. Ch. 586; 10 Jur. N. S. 694), 202
 — Hoare v. (1 Eq. 535), 298, 307
 — Hutchin v., 198
 — v. Leeds, Duke of, 124
 — Lett v., 248
 — Pruett v., 267
 — to Bowlett, 78, 368
 — Smith v., 550
 Osbourn, Woodden v., 109
 O'Sullivan, Talbot v., 402
 Oswald, *In bonis*, 23
 — Trotter v., 583, 584
 O'Toole v. Browne, 176
 Ottey, Baines v., 290
 Ouseley v. Anstruther, 676, 678
 Ovenden, Long v., 153
 Over, Thwaites v., 271
 Overbury v. Overbury, 55
 Overhill's Trusts, *Re*, 238, 241
 Ovey, *In re*; Broadbent v. Barrow, 304, 677, 678
 Owen, *Re* (36 Sol. J. 539), 195
 — *Re* (43 W. R. 55), 409
 Owen's Will, *In re*, 328
 — v. Bryant, 243
 — Cradock v., 650, 652
 — v. Delamere, 382
 — v. Penny, 333
 — Thorp v. (2 Ha. 607), 404
 — Thorp v. (2 Sm. & G. 90), 276
 — v. Williams, 436
 — Williams v., 106
 Owens, *Re*; Jones v. Owens, 378
 — Jones v., 378
 Owston, *In bonis*, 27
 Owthwaite, *In re*, Owthwaite v. Taylor, 388
 — v. Taylor, 388
 Oxenden, Doe d. Chichester v., 102
 — v. Compton, 426
 Oxford v. Churchill, 267
 — Bishop of, A.-G. v., 305
 — Earl of, Briggs v., 479
 PAGE, Collingwood v., 281
 Pack, Bescoby v., 162
 Packer v. Scott, 482
 Packington's Case, 425
 Packington, Wych v., 402
 Packman v. Moss, 185
 Padbury v. Clark, 93
 Padmore v. Wharton, 46
 Padwick, Bubb v., 568
 Page, Denn d. Breddon v., 578
 — v. Hayward, 460
 — v. Leapingwell, 114, 117, 120, 312

T.W.

- Page, Nelson v., 138, 141
 — v. Page, 638
 — Price v., 222, 223
 — v. Rutland, 458
 — v. Soper, 390, 396
 — v. Way, 407
 — v. Young, 113, 193
 Paget's Settled Estates, *In re*, 503
 Paget v. Grenfell, 627
 — v. Huish, 118
 Paice, Atkinson v., 607
 — v. Canterbury, Archbishop of,
 310, 313, 617
 Pain v. Benson, 559
 — Lee v., 101, 122, 124, 221,
 222, 228, 249, 643
 Paine v. Hyde, 503
 — v. Jones, 437
 — v. Stratton, 391
 — v. Wagner, 230
 Painter, Chester v., 152
 Palagi, Cadogan v., 159
 Palin v. Brookes, 110
 — v. Hills, 292
 Palmer's Trusts, *In re*, 551
 Palmer, *In bonis*, 81
 — *In bonis*; Palmer v. Peat, 41
 — *In re*; Palmer v. Answorth,
 195
 — v. Answorth, 195
 — Cadell v., 475, 480
 — Congreve v., 254, 539, 543
 — v. Craufurd, 410
 — v. Cruttwell, 252
 — Doe v., 32, 33
 — v. Flower, 405
 — v. Graves, 671
 — Harvey v., 132
 — v. Newell, 202
 — Nottley v., 94
 — v. Orpen, 472
 — v. Palmer, 419
 — v. Peat, 41
 — Shalcross v., 47
 — v. Simmonds, 399
 — Smith v., 289, 290
 — Wills v., 277
 Pankhurst v. Howell, 634
 Pannel, Lane v., 521
 Papillon v. Papillon, 628
 — v. Voice, 598
 Paraguay, Provisional Govt. of, Lynch
 v., 3
 Paramour v. Yardley, 618
 Pares, Peacocke v., 237
 Parfitt, Abbott v., 382
 — Coombes v., 515
 — v. Hember, 487, 488
 — v. Lawless, 22
 Paris v. Miller, 338
 — v. Paris, 441
 — Pieschel v., 308
 Parish, Drummond v., 51
 — v. Hudson, 145
 Park, Fairer v., 120, 631
 Park, Wignall v., 315
 Parke, Amphlett v., 211
 Parker, *In bonis* (1 Sw. & Tr. 523),
 557
 — *In bonis* (2 Sw. & T. 375), 51
 — *In re*; Barker v. Barker, 466
 — *In re*; Bentham v. Wilson,
 266
 — *In re*; Wignall v. Park, 315
 — v. Birks, 337, 574, 583
 — v. Bolton, 401, 593
 — Caruth v., 294
 — Chitty v., 214, 215
 — Clarke v., 501, 502
 — Cox v., 650
 — v. Downing, 95
 — v. Duncan, 22
 — v. Fearnley, 672
 — v. Felgate, 21
 — Goodright d. Ravell v., 416
 — v. Hodgson, 458
 — Hudson v., 28
 — Kilvington v., 618
 — Lambert v., 152
 — v. Marchant, 161, 188, 227
 — v. Nickson, 277
 — Press v., 109
 — Price v., 18
 — v. Sowerby, 95, 468
 — Sparling v., 347, 392
 — v. Tootal, 543, 579, 603, 621
 — v. Winder, 254
 Parkhurst, Smith d. Dormer v., 451
 Parkin, *In re*; Hill v. Schwarz, 13,
 664
 — v. Bainbridge, 33
 — v. Creswell, 457
 — Doe d. Parkin v., 103, 108
 — v. Hodgkinson, 562
 — v. Knight, 342, 393
 — v. Parkin, 103, 108
 — Surtees v., 658
 Parkinson's Trust, 274
 Parkinson, Ames v., 388
 Parkyns, Ranccliffe v., 92, 93
 Parnall v. Parnall, 399
 Parnell, *In bonis*, 83
 — v. Lyon, 501
 Parnham's Trusts, *In re*, 510
 Parnter, A.-G. v., 14
 Parr's Trust, *Re*, 460
 Parr, *In bonis*, 39
 — v. Swindells, 580
 — Webster v., 584
 Parratt, Doe v., 334
 Parrott, *Re*; Parrott v. Parrott, 165
 — *Re*; Walter v. Parrott, 597,
 600, 602
 — Alger v., 289, 390
 — v. Davies, 465
 — v. Parrott, 165
 — Walter v., 597, 600, 602
 — v. Worsfold, 115
 Parry, *Re*; Powell v. Parry, 493
 — *Re*; Scott v. Leak, 409

- Parry & Daggs, *In re*, 506
 — Foley v., 400, 415
 — Hunt v., 386
 — Meadows v., 527
 — Phillips v., 657
 — Powell v., 493
 — v. Roberts, 503
 Parsons, *In re*; Stockley v. Parsons, 16
 — A.-G. v., 317
 — Baker v., 360, 400
 — v. Coke, 393, 405
 — v. Gulliford, 544
 — v. Justice, 258, 259, 263
 — v. Lance, 58
 — v. Miller, 658, 667, 672
 — v. Parsons (1 Ves. Jun. 266), 223
 — v. Parsons (8 Eq. 280), 280, 343, 410
 — v. Saffery, 294
 — Stockley v., 16
 Partington, Andrews v., 255
 Partridge v. Baylis, 565
 — Brindley v., 377
 — v. Foster, 524
 — v. Partridge (9 Mod. 269; Ca. t. Talb. 226), 112, 128
 — v. Partridge ([1894] 1 Ch. 351), 452, 503
 Pascall, *In bonis*, 61
 Paske, Clements v., 578
 — v. Haselfoot, 76, 639
 — v. Ollatt, 21
 Pasmore v. Huggins, 247
 Pass v. Dundas, 389
 Patch, Barnes v., 251, 274, 275
 — Channon v., 426
 — v. Shore, 199
 Patchell, *In bonis*, 41
 Patchett, Leedham v., 376, 416
 Patching v. Barnett (49 L. J. Ch. 665), 482
 — v. Barnett (51 L. J. Ch. 74), 118, 409, 665, 677
 — v. Barnett (28 W. R. 886), 144, 192, 193, 222, 455, 484
 Pater, Collinson v., 314
 Paternoster, Graham v., 317
 Paterson v. Rolland, 332
 — v. Scott, 658, 667
 Patience, *Re*; Patience v. Main, 8
 Paton, Lyall v., 8
 — v. Ormerod, 192, 193, 613
 Patrick v. Royle, 253
 — v. Yeatherd, 188
 Patrickson, Dacre v., 138, 652, 675
 Patten, *Re* (6 Jur. N. S. 151), 4, 6
 — *Re* (52 L. J. Ch. 787), 371
 — v. Poulten, 46
 — v. Sparks, 286
 Pattenden v. Hobson, 281
 Patterson v. Huddart, 175, 187
 Pattinson, Pease v., 296
 Pattison, Barstow v., 506
 Pattison, Lowry v., 501
 — v. Pattison (19 B. 638), 251, 610
 — v. Pattison (1 M. & K. 12), 111
 Patton v. Randall, 372
 Paul v. Children, 241
 — v. Hewetson, 76
 — Matthews v., 234
 — v. Paul, 108
 Paulin, Kirk v., 512
 Paul, Browne v., 404
 Pawlet v. Dogget, 583
 Pawson v. Pawson, 414
 Paxton, Cholmeley v., 364
 — v. Macreight, 6, 7
 — Northey v., 165
 Paylor v. Pegg, 524, 607
 Payne, *Ex parte*, 400
 — *In re*, 461, 467, 505
 — Lord Carrington v., 616
 — Hagger v., 256, 257
 — Pennington v., 373, 375
 — Randall v., 501
 — v. Trappes, 46, 58
 Paynton, Tyrrell v., 21
 Peach, Lambard v., 583, 590
 — Mackinnon v., 529
 — Simpson v., 460
 Peacock's Estate, *In re* (14 Eq. 236), 634
 — Trusts, *In re* (10 Ch. D. 490), 513
 Peacock, Berriman v., 426
 — Biggs v., 371
 — Dixon v., 432, 433
 — Forbes v., 372
 — v. Frigout, 481, 486
 — Hodges v., 124
 — v. Lucas, 448
 — v. Peacock, 657
 — v. Stockford (3 D. M. & G. 73), 249
 — v. Stockford (7 D. M. & G. 129), 254
 Peacocke v. Monk, 11
 — v. Pares, 237
 Peagrum, Bird v., 512
 Peake v. Penlington, 602
 Pearce, *In re*; Roberts v. Stephens, 127
 — v. Carrington, 259
 — Cornick v., 209, 364
 — v. Edmeades, 253, 254, 422
 — v. Gardner, 365
 — v. Graham, 642
 — v. Loman, 667
 — Perriman v., 283
 — v. Vincent, 272
 Peard v. Kekewich, 477, 491
 — v. Morton, 533
 Peareth v. Marriott, 157
 Parkes, Tanière v., 253
 Parks v. Moseley, 484
 Pearman v. Pearman, 464, 533
 Pearn, *In bonis*, 25, 28
 Pearsall, Clements v., 146, 153

- Pearshall v. Simpson, 456
 Pearse, *In bonis*, 29
 — v. Baron, 602
 — Heasman v., 268, 334, 472,
 473, 478, 543, 546
 Pearson, *In bonis*, 28
 — A.-G. v., 299
 — Brooke v., 422
 — Cranswick v., 421
 — Doe d. Gill v. 504
 — v. Dolman, 412, 464, 465,
 466, 505
 — Freeland v., 76, 263, 639, 642
 — Grey v., 570, 571, 573
 — v. Helliwell, 416
 — v. Pearson (2 P. & D. 451), 28
 — v. Pearson (1 Sch. & Lef. 10),
 149
 — v. Rutter, 524
 — v. Spencer, 173
 — v. Stephen, 252, 393, 546
 — Sturgess v., 525
 — Watson v., 360
 — Wright v., 349
 Pease, Jackson v., 662, 665
 — v. Pattinson, 296
 Peat v. Broughton, 509, 510
 — v. Chapman, 638
 — Palmer v., 41
 — v. Powell, 607
 Peck v. Halsey, 623
 Peckett, Field v. (9 W. R. 526), 164
 — Field v. (29 B. 568), 211
 Pedder v. Hunt, 354
 Pedley v. Dodds, 103
 — Hasluck v., 144
 Pedrotti's Will, *Re*, 396
 Peek's Trust, *In re*, 149, 465
 Peek, Brown v., 452
 — v. Savory, 482
 Peel, *In bonis*, 220
 — v. Catlow, 543
 Pegg, Paylor v., 524, 607
 Peillon v. Brooking, 514
 Peirce, Hampshire v., 250
 — v. McNeale, 204
 Peixoto, Bradley v., 505
 Pelham, Cloudsley v., 672
 — Lady Lincoln v., 235, 251
 Pell v. Jeyes, 180
 Pemberton, Shingler v., 11
 Pembroke v. Friend, 139, 140
 Pemsel, Commissioners for special
 purposes of Income Tax v., 295
 Penfold, Moody v., 358, 650
 — v. Shillingford, 430, 439
 Pengelley v. Herbert, 199
 Penley, Whitcher v., 541
 Penlington, Peake v., 602
 Pennant, Blackwell v., 228
 — v. Kingscote, 26
 Pennesfather v. Pennesfather, 205
 Pennell v. Earl of Dysart, 440
 Penney, Holmes v., 408
 Pennington, Bateman v., 33
 Pennington, Clay v., 393, 543
 — Hargreaves v., 126, 615
 — Lowe v., 206
 — v. Payne, 373, 375
 Pennock v. Pennock, 395, 520
 Penny, Briggs v., 398, 647
 — v. Clarke, 333
 — Donn v., 393
 — Owen v., 333
 — v. Penny, 665
 — v. Pippin, 394
 — v. Turner, 539
 Penoyre, Wood v., 150
 Penrhyn, Lord, Dawkins v., 506
 Penrose v. Manning, 241
 Pentecost v. Ley, 110
 Penton, Stares v., 636
 Pepper's Trusts, *In re*, 417
 Pepper v. Pepper, 41
 — Smith v., 270, 543
 Peppercorn v. Wayman, 366
 Peppin v. Beckford, 230
 Peppitt's Estate, *Re*; Chester v. Phil-
 lips, 280
 Percival, *Re*; Boote v. Dutton, 615
 — v. Percival, 145, 261, 521, 523
 Percy, *In re*; Percy v. Percy, 151,
 419, 519
 — Fairland v., 382
 — Greenwood v., 550
 — v. Percy (35 B. 295), 417
 — v. Percy (24 Ch. D. 616), 151,
 419, 519
 Pereira, Dufour v., 13
 Perfect, Bree v., 461, 468
 — v. Curzon, Lord, 471
 Perigal, Myers v., 314
 Perkes, Doe v., 44
 Perkins v. Baynton, 332
 — Biddle v., 479
 — Biscoe v., 358
 — v. Cooke, 416, 417
 — v. Fladgate, 187, 250
 — Timewell v., 176, 188
 Perks, Horton v., 200
 Perowne, Barker v., 447
 Perpetual Trustee Co., Trew v., 596
 Perratt, Doe d. Winter v., 277, 278,
 478
 Perriman v. Pearce, 283
 Perrin v. Blake, 348
 — v. Lyon, 499
 Perring, Pomfret v., 202, 203
 — v. Traill, 322
 Perrot v. Perrot, 427, 428
 Perrott v. Perrott, 37
 Perry, Circuit v., 193, 613
 — Heath v., 151
 — v. Merritt, 505, 519
 — Rolfe v., 138
 — Sibley v., 113, 168, 267
 — v. Tuomey, 301
 Perryn, Doe d. Comberbach v., 577
 Pertwee, Green v., 194
 Pery v. White, 610

TABLE OF CASES.

ci

- Peter v. Stirling, 666
 Peterborough, Bishop of, Boyle v., 639
 — Bishop of, v. Mortlock, 113
 Peters, Abbott v., 52
 — v. Baucherean, 83
 — Blake v., 424, 437
 — v. Lewes & East Grinstead Ry. Co., 370
 — Louch v., 156
 — Usticke v., 93
 Peterson v. Peterson, 388, 662
 Petgrave, Workman v., 206
 Petre v. Ferrers, 164
 — v. Petre, 121, 663
 Pett v. Fellows, 152
 Pettinger v. Ambler, 200
 Pettman, Follett v., 44
 Petty, Salisbury v., 541
 — v. Wilson, 161
 Petvin, Aspinall v., 604, 605
 Pew, Hale v., 479, 489
 Pewterers, Company of, v. Governors of Christ's Hospital, 476
 Peyton v. Bury, 451, 496
 — Dashwood v., 89
 — Twopeny v., 407
 Phear, Furniss v., 222
 Phelan v. Slattery, 223, 301
 Phelps, *In bonis*, 63
 — v. Evans, 288
 — Longhead v., 482
 — Thomas v., 177
 Phene's Trusts, *In re*, 262, 333
 Philbrick's Trusts, *In re*, 202
 Philcox, Burrough v., 609
 Phillips' Trusts, *In re*, 449
 — *In re*; Phillips v. Levy, 494
 — *In re*; Robinson v. Burke, 198
 — v. Aldridge, 303
 — v. Allen, 338
 — v. Barker, 222
 — v. Barlow, 429
 — v. Beal, 518
 — Brydges v., 676
 — v. Cayley, 198
 — v. Chamberlayne, 394
 — Chester v., 280
 — Clark v., 645
 — Doe d. Thorne v., 339
 — Dormer v., 277
 — v. Eastwood, 656
 — v. Evans, 291
 — Frogley v., 266
 — v. Garth, 283
 — v. Gutteridge, 417
 — Hopkins v., 318
 — v. James, 601
 — v. Levy, 494
 — v. Low, 173
 — v. Parry, 657
 — v. Phillips (8 B. 193), 418
 — v. Phillips (29 Ch. D. 673), 436
 — v. Phillips (3 Ha. 281), 640
 — v. Phillips (1 M. & K. 649), 214
 Phillips v. Phillips (W. N. 1877, 260), 493, 498
 — v. Phillips (13 W. R. 170; 10 Jur. N. S. 1173), 544
 — Read v., 52
 — Roberts v., 29
 — v. Smith, 358
 — Stringer v., 556
 — Williams v., 169
 Phillipson, Murkin v., 468
 Philpot, *In bonis*, 27
 Philpott v. Governors of St. George's Hospital, 320
 Philips' Will, *In re*, 288, 540, 543
 Philips v. Evans, 288
 Phipps, *In bonis*, 51
 — Ackers v., 147, 454, 455
 — v. Hale, 30
 — v. Kelynge, 490
 — Mulgrave, Lord, 577
 Phyn, Bell v., 570, 571
 Picard v. Mitchell, 416
 Pickard, *In re*; Elmsley v. Mitchell, 316
 — v. Holroyd, 499
 — Neate v., 58
 Picken v. Matthews, 483
 Pickering v. Pickering, 444
 — v. Stamford, Lord, 640, 648
 — Stamper v., 416, 417
 Pickersgill v. Grey, 521
 — v. Rodger, 87
 Pickett, Round v., 422
 Pickford v. Brown, 665
 — Lister v., 172
 — Orange v., 77
 Pickup's Will, *Re*, 247
 Pickup v. Atkinson, 445
 — Grimshawe v., 573
 Pickwell v. Spencer, 339
 Pickwick v. Gibbes, 152
 Pidgely v. Pidgely, 205
 — v. Rawling, 426
 Pierce v. Locke, 626
 Piercey, Newman v., 250
 Piercy, *In bonis*, 29
 Pierson v. Garnet, 400
 — v. Garrett, 403
 — v. Vickers, 350
 Pieschel v. Paris, 308
 Pigg v. Clarke, 274
 Piggott, Fraser v., 241
 — v. Green, 292
 — Wilson v., 637
 Pigott v. Bullock, 427
 — Doe d. Dell v., 103
 — Wilder v., 90, 595
 Pike, Brownrigg v., 68
 — v. Fitzgibbon, 18
 Pilcher, Boulton v., 469
 Pile, Curry v., 122
 — Hayward v., 439
 — v. Salter, 457
 — Stevens v., 235, 472
 Pilkington's Trusts, 111 128

- Pilkington v. Pilkington, 258
 Pillans, Home v., 535
 Pillers v. Edwards, 517
 Pillgrem v. Pillgrem, 382
 Pilliner, Richardson v., 167
 Pinbury v. Elkin, 584
 Pinchin v. Simms, 631
 Pinder v. Pinder, 287, 288
 Pinèdi's Settlement Trusts, *In re*,
 200, 202
 Pinhorne, *Re*; Moreton v. Hughes,
 541, 641, 643
 Pinney v. Hunt, 71
 Pinniger, Gundry v., 282, 289
 Piper v. Piper, 138
 — Wise v., 602
 Pippin, Penny v., 394
 Pistol v. Riccardson, 182
 Pitcairne v. Brase, 223
 Pitcher, Cooper v., 608
 — Dummer v., 75, 92
 Pitman v. Holborrow, 411
 — v. Pitman, 210
 — v. Stevens, 168, 177
 Pitt's Estate, *In re*; Lacy v. Stone,
 668
 — Will, 227, 228
 Pitt v. Jackson, 347, 488
 — v. Pitt, 7
 — Simmons v., 646
 — Swinburne v., 205, 206
 — Tothill v., 391
 Pixley v. Harvey, 507
 Planner v. Scudamore, 455
 Plaskett, Willis v., 160, 547
 Platel, Start v., 272
 Platt v. A.-G. of New South Wales, 8
 — Danily v., 229, 242
 — Eckersley v., 38, 46
 — v. Powles, 343
 — Stead v., 461, 550
 Player v. Nicholls, 360
 Playfair v. Cooper, 417
 Playfoot, Cramp v., 307, 320
 Playford v. Hoare, 361
 Payne v. Scriven, 24
 Playters v. Abbott, 438
 Plenty v. West (6 C. B. 201; 16 B.
 175), 357
 — v. West (2 Phillim. 264), 41
 Plowden v. Gayford, 396
 Plowright, Scouler v., 22
 Plumbe v. Neild, 441
 Plumptre, Doe v., 284
 Plunkett v. Holmes, 348
 — v. Reilly, 651
 Plunkett, Gillooly v., 155, 666
 — v. Lewis, 629
 Pocock v. A.-G., 303
 — Brown v., 263
 — Chandler v., 203
 — Roberts v., 114
 Pogson v. Thomas, 103, 176
 Poilblanc, Androvin v., 653
 Polden v. Bastard, 173
 Pole v. Pole, 436
 — v. Somers, Lord, 89
 Polhill, Ware v., 479
 Pollard's Estate, *In re*, 331, 340, 341
 Pollard, Cofield v., 200
 — Drewett v., 492
 Polley v. Polley, 276
 — v. Seymour, 210
 Pollock, *In re*; Pollock v. Worrall,
 634
 — Kelly v., 334
 — Middleton v.; *Ex parte* Nugoe,
 134
 — v. Pollock, 144
 — v. Worrall, 634
 Pollok, Whyte v., 12
 Pomfret v. Graham, 551
 — v. Perring, 202, 208
 Pond, Jarvis v., 543, 544
 Pontet, Deveze v., 630
 Poole v. Bott, 460, 498
 — v. Heron, 118
 — v. Odling, 92
 — v. Poole (3 B. & P. 620),
 352
 — v. Poole (7 Ch. 17), 635, 636,
 669
 — Steedman v., 516
 Pooley, *In re*, 100
 Pope, Agnew v., 616
 — Haslewood v., 658
 — Medworth v., 238, 245
 — v. Pope (14 B. 593), 268
 — v. Pope (10 Sim. 1), 399
 — v. Whitcombe (3 Mer. 689),
 271, 273
 — v. Whitcombe (3 Russ. 124)
 557
 Popham v. Lady Aylesbury, 165
 — v. Bampffield, 451
 — Fischer v., 28
 Popple v. Cunison, 53
 Porcher v. Wilson, 140
 Portal & Lamb, *In re*, 104, 111
 170
 Portarlington, Earl of, v. Damer
 661, 670
 Porter, *In bonis*, 12
 Porter's Trusts, 541, 641
 — *In re*; Coulson v. Capper,
 505, 508
 Porter v. Baddeley, 444
 — v. Fox, 482
 — v. Fry, 496
 — v. Tournay, 164
 Portington, R. v., 300
 Portland, Countess of, v. Prodgara,
 18
 — Duke of, Bentinck v., 484
 Postlethwaite, Warren v., 666
 Pottinger v. Wightman, 5
 Potter's Trusts, *In re*, 545
 Potter, *Re*; Potter v. Potter, 409
 — v. Baker, 413
 — Bibbens v., 420, 519, 530

- Potter, Hope v., 621
 — Kirby v., 114
 — May v., 152
 — v. Potter, 409
 — v. Richards, 499
 Pottow v. Fricker, 338
 Potts, *In re*; Hooley v. Fountain, 567
 — v. Atherton, 464
 — v. Britton, 423
 — Fenwick v., 362
 — Hill v., 413
 — v. Potts (3 J. & Lat. 353; 9 Ir. E. 577; 1 H. L. 671), 593
 — v. Potts (3 L. J. Ch. O. S. 176), 424, 425
 — v. Smith, 660
 Poulden, A.-G. v., 417, 490, 494
 — Snow v., 453
 Poulett, Earl, v. Hood, 162
 Poulten, Patten v., 46
 Poulteney, Garden v., 327
 Poulter v. Shackel, 133
 Poulton, Allen v., 181
 Pound, Vickers v., 117, 164
 Pounder, *In re*; Williams v. Pounder, 77, 396, 399, 420
 — Williams v., 77, 396, 399, 420
 Powell, *Re* (Jo. 49), 160, 161
 Powell's Trust, *Re* (18 W. R. 228; 39 L. J. Ch. 188), 198, 486
 Powell v. A.-G., 301
 — Anster v., 635
 — v. Boggis, 280, 392
 — Chester v., 136
 — v. Davies, 231
 — v. Hellicar, 10
 — v. Howells, 610
 — v. Merritt, 650
 — v. Morgan, 500
 — v. Parry, 493
 — Peat v., 607
 — v. Powell (28 L. T. N. S. 730), 252
 — v. Powell (1 P. & D. 209), 38
 — v. Rawle, 496
 — Rawlins v., 630
 — v. Riley, 118, 678
 — Robertson v., 618
 — v. Robins, 672
 — Twining v., 634
 Power, Burton v., 339
 — Hartford v., 513
 — v. Hayne, 411
 — v. Power, 138
 — v. Quealy, 283
 — Richardson v., 562
 — Smyth v., 579
 Powerscourt v. Powerscourt, 295
 Powis v. Burdett, 467, 470
 — v. Matthews, 472
 Powles, Platt v., 343
 Powlett v. Duchess of Bolton, 427
 Powlett, Kelly v., 164
 Pownall v. Graham, 485
 — Griffith v., 483
 Powys v. Blagrove, 430
 — Keck, Lord Lilford v. (No. 1), (30 B. 295), 174
 — Keck, Lord Lilford v. (No. 2), (30 B. 300), 106
 — Keck, Lord Lilford v. (L. R. 1 Eq. 347), 667
 — v. Mansfield, 634
 Poynder, Hinxman v., 401
 Poyner, Harris v., 430, 445
 Poyntz, Fonnereau v., 115, 662
 Praed, Viscount Exmouth v., 455, 496, 592, 594
 Prall, Archer v., 386
 — v. Bevan, 271, 272, 286
 Prater, *In re*; Desinge v. Beare, 166
 Pratt, *In re*; Pratt v. Pratt, 116
 — Doe d. Pratt v., 178
 — v. Harvey, 317
 — Hoste v., 257
 — v. Jackson, 164, 165
 — v. Matthew (22 B. 328), 228, 241, 244, 245
 — v. Matthew (8 D. M. & G. 522), 569
 — v. Prat (14 Sim. 129), 43
 — v. Pratt (6 A. & E. 180), 178
 — v. Pratt ([1894] 1 Ch. 491), 116
 — v. Sladden, 652, 654
 — Winson v., 39, 44
 Preece, Stead v., 219
 Prendergast, Gabb v., 238, 240
 — v. Prendergast, 388
 Prentice v. Brooke, 393
 — Tabor v., 615
 Prescott v. Barker, 183
 — Campbell v., 188
 — Forrest v., 675
 — Holmes v., 146, 455
 President of U. S. v. Drummond, 5, 295
 Press v. Parker, 109
 Preston, Fielding v., 119
 — Holder v., 366
 — Jermy v., 219
 — v. Melville (8 Cl. & F. 1), 3
 — v. Melville (16 Sim. 163), 441
 — v. Preston, 672
 Prevost v. Clarke, 400, 403
 Price, *In bonis*, 68
 — *In re*; Stafford v. Stafford, 16
 — *In re*; Williams v. Jenkins, 665, 666
 — v. Anderson, 441
 — A.-G. v. (3 Atk. 109), 301
 — A.-G. v. (17 Ves. 371), 302
 — Carrier v., 98, 297, 420

- Price, Chandless v., 391
 — Curtis v., 347, 361
 — v. Dewhurst, 3
 — Franks v., 456, 580
 — Geaves v., 41, 80
 — v. Hall, 261, 455, 521
 — Jones v., 270
 — v. Lockley, 547
 — v. North, 671
 — v. Page, 222, 223
 — v. Parker, 18
 — v. Price, 45
 — R. v., 79
 Prichard v. Ames, 512
 — Heach v., 171
 — v. Prichard, 159
 Pride v. Bubb, 17
 — v. Fooks (2 B. 430), 491
 — v. Fooks (3 De G. & J. 252), 581
 Prideaux, Sweeting v., 594
 Pridham, Luckcraft v. (48 L. J. Ch. 636), 662, 666, 668, 677
 — Luckcraft (6 Ch. D. 205), 322
 Pridie v. Field, 156
 Prieaux, Lee v., 513
 Priest, Rippen v., 162
 Priestley v. Holgate, 452
 Priestman v. Thomas, 71
 Primate of Ireland, Lord, West v., 233
 Prince, Upton v., 634
 Pring v. Pring, 64
 Pringle, *In re*; Walker v. Stuart, 160
 Prior, Sproule v., 667
 Pritchard's Trusts, 558
 Pritchard v. Arbouin, 317
 — Bodenham v., 173
 — Bull v., 461
 — Hughes v., 168
 Proby, Bastard v., 598
 Procter v. Upton, 391
 Proctor v. Bishop of Bath and Wells, 481
 — Snowball v., 346
 Prodgers, Portland, Countess of, v., 18
 Prothero, Brummel v., 678
 Provisional Government of Paraguay, Lynch v., 3
 Prowse v. Abingdon, 459, 667
 Pruen, Griffith v., 294
 — v. Osborne, 267
 Pryce, Hare v., 191
 — v. Newbolt, 226
 Pryer, Wilkins v., 42
 Pryor v. Pryor (2 D. J. S. 205), 65
 — v. Pryor (29 L. J. P. 114), 30
 Prytherch, *In re*; Prytherch v. Williams, 236
 — v. Williams, 236
 Puckey, Denn d. Webb v., 355
 Puddephatt, *In bonis*, 25, 69
 Pugh, Goodtitle d. Bailey v., 277
 — Lang v., 463
 Pullen, Dalby v., 75
 Pulling, Berkeley v., 250
 Pulsford v. Hunter, 465, 466
 Pulteney, Lady Cavan v., 91
 Punchard, *In bonis*, 81
 Punshon, Stockil v., 63
 Purcell, Manning v., 158, 164, 165
 Purday v. Johnson, 297, 298, 304, 305
 Purdon, Longford v., 14, 22
 — North, Lord, v., 653
 Purse v. Snaplin, 113
 Purser v. Darby, 186
 Purton, Gimblett v., 257, 258
 Pushman v. Milliter, 399
 Puxley, Lewis v., 345
 — v. Puxley, 218
 Pybus, De Mazay v., 655
 — v. Mitford, 347
 — Smith v., 117
 Pye, Currie v., 124, 313
 — Maddison v., 666
 Pym v. Lockyer (5 M. & C. 29), 632
 — v. Lockyer (12 Sim. 394), 507
 — Salt v., 620
 Pyne v. Dor, 424
 Pyot v. Pyot, 284
 QUAIN v. Harvey, 670
 Quarm v. Quarm, 330
 Quealy, Power v., 283
 Queen's Coll. v. Sutton, 113, 116
 — Proctor, Coombs v., 19
 — Proctor, Gregory v., 25, 31
 Quennell v. Turner, 110, 676, 678
 Quedsted v. Michell, 279
 Quick, Aird v., 634
 — v. Quick, 47
 Quihampton v. Going, 61, 634
 Quin, Baylee v., 122
 — Reichenbach v., 301
 Quinlan, Sims v., 300, 308
 Quinn v. Armstrong, 208
 — v. Butler, 40, 616
 — Hodkinson v., 373
 Quirk, *In re*; Quirk v. Quirk, 334
 — v. Quirk, 334
 RABBETH v. Squire, 172, 611, 612
 Rachfield v. Careless, 653, 654
 Rackham v. De la Mare, 528
 — v. Siddall, 360
 Rackstraw v. Vile, 584
 Radburn v. Jervis, 63, 155, 410

- Radcliffe v. Buckley, 247
 — Day v., 565
 — Holloway v., 283, 289
 Radford v. Southern, 108
 — v. Willis, 230
 Radnor, Earl of, Campbell v., 124
 — Lord, Talbot v., 88
 Rae, *In bonis*, 51, 52
 Rae's Estate, *In re*, 402
 Raffanel, *In bonis*, 8
 Raffety v. King, 434
 Raggett v. Browne, 241
 Raikes v. Boulton, 663
 — v. Raikes, 117, 120, 662
 — Sanford v., 101
 — v. Ward, 398
 Raine, *In bonis*, 13
 Rainford v. Knowles, 291
 Rainsford, Browne v., 552
 Raisbeck, Moor v., 132, 247, 614
 Raleigh, Vine v., 490
 Ralph v. Carrick, 268, 270, 494, 604,
 606, 657
 Ramage, Hopkins v., 74
 Rammell v. Gillow, 563, 565
 Ramsay, Bridger v., 578
 — v. Shelmardine, 194, 644, 649
 — v. Thorngate, 409
 Ramsbottom, Holden v., 164
 Ranccliffe v. Parkyns, 92, 93
 Randall v. Bookey, 653
 — Clark v., 647
 — v. Daniell, 598
 — Head v., 269, 333
 — Illaley v., 417
 — Jones v., 421
 — Lett v., 413, 524, 649
 — Patton v., 372
 — v. Payne, 501
 — v. Randall, 437
 — v. Russell, 518
 Raudell, *In re*; Randell v. Dixon,
 476
 — v. Dixon, 476
 Randfield v. Randfield, 100, 535,
 615
 Randolph, White v., 42, 202
 Ranelagh's Will, *In re* Lord, 438
 Ranelagh v. Ranelagh (12 B. 200),
 608
 — v. Ranelagh (2 M. & K. 441),
 550, 585
 — v. Ranelagh (41 W. R. 549),
 558
 Ranier, Sprackling v., 263
 Rankin, Fryer v., 161
 Ranking's Settlement Trusts, 282,
 283
 Ransome v. Burgess, 385
 Ratford v. Willis, 569
 Rattey, Hill v., 340
 Ravald v. Russell, 484
 Ravenhill, Hereford v., 211, 214
 Ravenscroft v. Hunter, 33
 — v. Jones, 632, 633, 634
 Ravenscroft v. Workman, 668
 Raw, *In re*; Morris v. Griffiths,
 210
 Rawding, Doe d. Baldwin v., 569,
 571
 Rawle, Powell v., 496
 Rawley, Grieves v., 265
 Rawling, Pidgely v., 426
 Rawlings v. Jennings, 189, 394, 413,
 654
 Rawlins' Trusts, *In re*, 608
 Rawlins, *In bonis* (2 Curt. 326), 28
 — *In bonis* (48 L. J. P. 64; 28
 W. R. 139), 43
 — Ford v., 468
 — v. Powell, 630
 — v. Rawlins, 146, 151
 — Reay v., 248
 — Scalé v., 608, 609
 Rawlinson v. Rawlinson, 130
 — v. Wass, 278
 Rawson, Lazonby v., 416
 — v. M'Causland, 155
 Ray, *Ex parte*, 513
 — West v., 77
 Rayner, Ingham v., 238, 266
 — v. Mowbray, 272, 287
 Raynor, Mussoorie Bank v., 399
 Read v. Crop, 92
 — v. Hodgins, 301
 — Neathway v., 554, 555
 — v. Phillips, 52
 — v. Read, 178
 — Sansbury v., 468
 — v. Snell, 343, 391
 — v. Stedman, 650, 652
 Reade, Doe d. Reade v., 186
 — v. Reade (9 L. R. Ir. 409),
 630
 — v. Reade (8 T. R. 118), 186
 — v. Reade (5 Ves. 744), 639
 Reading, Weadon v., 378
 Reay, Cookson v., 211
 — v. Cowcher, 54
 — Lord, Gordon v., 63
 — v. Rawlins, 248
 Rebbeck, *In re*; Bennett v. Rebbeck,
 374
 — Bennett v., 374
 Record, Bielefield v., 567
 Rede v. Oakes, 370
 Redfern, *In re*; Redfern v. Bryning,
 622
 — v. Bryning, 622
 — Scholesfield v., 447
 Redington v. Redington, 435
 Redman v. Rymer, 376
 Reece v. Steel, 488
 Reed, *In re*, 265
 — Aynsley v., 435
 — v. Braithwaite, 268, 572
 — v. Devaynes, 292
 — Dix v., 293
 — Watson v., 123
 Rees, *In bonis*, 69

- Rees, *In re*; Rees v. George, 636
 — *Re*; Rees v. Rees, 133
 — *In re*; Williams v. Davis, 289
 — v. George, 636
 — Lewis v., 361
 — v. Rees (60 L. T. 260), 133
 — v. Rees (3 P. & D. 84), 31
 Reeve's Trusts, *In re*, 293
 Reeve v. A.-G., 304
 Reeves, Armstrong v., 298
 — v. Baker, 188, 395
 — v. Creswick, 437, 438
 — v. Glover, 53
 — v. Herne, 501
 R. v. Buccleuch, Duchess of, 169
 — v. Garland, 74
 — v. Melling, 348, 354
 — v. Nash, 84
 — v. Portington, 300
 — v. Price, 79
 R. v. Stafford, Marquess of, 577
 — v. Wilson, 366
 Reginall, Isaacs v., 217
 Reichenbach v. Quin, 301
 Reid, *In bonis*, 3
 — v. Atkinson, 400
 — Herbert v., 228
 — v. Hoare, 236
 — v. Reid (25 B. 469), 76, 207, 263, 530
 — v. Reid (31 Ch. D. 402), 15
 Reilly, Dillon v. (I. R. 10 Eq. 152), 299, 301
 — Dillon v. (9 L. R. Ir. 57), 653
 — Plunket v., 651
 Reith v. Seymour, 395
 Remnant v. Hood, 458
 Remow v. Ashley, 109
 Renand v. Tourangeau, 504
 Rendall, Chaffton v., 600
 Rendlesham, Thellusson v., 277
 Renneck, Woodcock v., 473
 Rennison, Longstaff v., 317, 318
 Rennoldson, Morley v., 498
 Repington v. Roberts-Gawen, 284, 477, 480, 481
 Representative Church Body, Gibson v., 303
 Repton, White v., 51
 Restal, Sparks v., 547, 608
 Revell v. Parker, 416
 Rew v. Lucraft, 580
 Reynard v. Spence, 95
 Reynish v. Martin, 500, 501
 Reynolds, *In bonis*, 42, 58, 63
 — Chapman v., 158
 — v. Godlee, 215
 — Lachlan v., 343, 480
 — Mitford v., 307
 — v. Torin, 94
 — Vaisey v., 161, 162, 165
 — v. Whitan, 220
 — v. White, 53
 Reynolds, Wild v., 648
 — v. Wright, 651
 Rhoades, *In re*; Lane v. Rhoades, 195
 — Lane v., 195
 Rhodes v. Jenkin, 372
 — v. Muswell Hill Land Co., 498
 — v. Rhodes (7 App. C. 192), 23, 604, 605
 — v. Rhodes (27 B. 413), 269
 — Scott v., 52, 53
 — Shaw v., 490
 — v. Whitehead, 261, 455, 521
 — Willox v., 118
 Riccardson, Pistol v., 182
 Rice, *In bonis*, 32
 — Aislabie v., 496
 — Weall v., 628
 Rich v. Cockell, 96
 — v. Whitfield, 210
 Richards, *In bonis*, 16
 — *In re*, 152
 Richards, *Re*; Williams v. Gorvin, 397
 — v. Bergavenny, Lady, 353
 — v. Davies, 574
 — Incorporated Soc. v., 98, 180, 321, 513
 — Joynt v., 410
 — Potter v., 499
 — v. Richards, 145, 236
 Richardson, *Ex parte*, 383
 Richardson's Trusts, *In re*, 206
 — v. Barry, 42
 — v. Elphinstone, 630
 — Forbes v., 417, 418
 — Glass v., 366
 — v. Greese, 631
 — v. Harrison, 348, 360, 610
 — Hume v., 447
 — Jobson v., 454, 462
 — v. Morton, 671
 — v. Nixon, 410
 — v. Pilliner, 167
 — v. Power, 562
 — v. Richardson, 283
 — Robertson v., 510
 — Saunders v., 232
 — v. Spragg, 540
 — Sutcliffe v., 495
 — Taylor v., 221
 — Vorley v., 555, 559
 — Wakefield v., 565
 — v. Watson (4 B. & Ad. 787), 110, 224
 — v. Watson (1 Nev. & M. 575), 101
 Richerson, *In re*; Scales v. Heyhoe, 215
 Rickabe v. Garwood, 251
 Rickard v. Barrett, 658, 667
 — v. Robson, 293
 Rickards, Darbon v., 417, 418
 — v. Mumford, 46

- Rickards, Sadler v., 157
 Rickets v. Ladley, 118
 Rickett v. Guillemard, 559
 — v. Sharp, 379
 Ricketts, Bourke v., 154
 — v. Lewis, 377
 — v. Loftus, 639
 — v. Turquand, 102
 Rickman v. Morgan, 628
 Riddell, Corcoran v., 313
 Ridding, *In bonis*, 24
 Ridehalgh, Habergham v., 248, 541, 544
 Ridge's Trusts, *In re*, 270, 611, 612
 Ridge v. Newton, 109, 161
 Ridgeway v. Munkittrick, 269
 Ridgway v. Ridgway, 467
 — Smith v., 103
 Ridings, Robley v., 258
 Ridley, *In re*; Buckton v. Hay, 477
 — Salisbury v., 570
 Rigden v. Vallier, 10
 — Vane, Earl v., 376
 Rigg, Brown v., 564
 Riggs, Corporation of London v., 173
 Right d. Compton v. Compton, 389
 — Creber, 279, 348
 — v. Day, 337, 583
 — d. Phillips v. Smith, 358
 Rigley's Trusts, *In re*, 298, 307
 Riley v. Garnett, 361, 455
 — Ormerod v., 526
 — Powell v., 118, 678
 Ring v. Hardwick, 487
 Kingrose v. Bramham, 248, 258
 Ringstead, King v., 604, 605
 Riordan v. Ranon, 64
 Ripley, *In bonis*, 69
 — v. Moysey, 365
 Rippen v. Priest, 162
 Rippin, *In bonis*, 38
 Rippon, Curtis v., 400
 — v. Norton, 407
 Riahton v. Cobb, 394
 Rivers' Settlement, *Re*, 236
 Roach, Doe d. Scott v., 520
 Roadknight, Newbold v., 117
 Roadley v. Dixon, 94
 Roake v. Denn (4 Bl. N. 8. 1), 195
 — Denn v. (6 Bing. 475; 5 B. & C. 732), 195
 — v. Newell, 454
 Roberts, Mills v., 153
 Robb v. Bp. Dorian, 303
 Robbins, Lumley v., 595
 Robe, *Re*; Slade v. Walpole, 116
 Robello, Delmare v., 220
 Robert Morgan's Case, 330
 Roberts, *Re*; Kiff v. Roberts, 188
 — *In re*; Repington v. Roberts-Gawen, 284, 477, 480, 481
 — *In re*; Tarleton v. Bruton, 541, 641, 643
 — v. Akeroyd, 458
 — Adams v., 234
 Roberts, Blewitt v., 413
 — v. Edwards, 281
 — Colston v., 141
 — v. Dixwell, 511
 — v. Edwards, 280, 281
 — Evans v., 431
 — Greenwood v., 483
 — Hanby v., 667
 — Kiff v., 188
 — v. Kuffin, 110, 191
 — Lloyd v., 28, 69
 — Parry v., 503
 — v. Phillips, 29
 — v. Pocock, 114
 — v. Roberts, 12
 — v. Smith, 94
 — v. Spicer, 512
 — Stanford v., 439
 — v. Stephens, 127
 — Vachell v., 445
 — v. Walker, 99, 676
 — Williams v., 402, 609
 — v. Youle, 569
 — -Gawen, Repington v., 284, 477, 480, 481
 Robertson's Trust, *Re*, 405
 Robertson v. Broadbent, 119
 — v. Fraser, 332
 — Hall v., 231
 — v. Powell, 618
 — v. Richardson, 510
 — Savage v., 240
 — v. Smith, 11
 — v. Walker, 369
 — Young v., 459, 560, 561, 562
 Robins, *Re*; Nelson v. Robins, 156
 — A.-G. v., 661
 — Collis v., 676, 678
 — Dolphin v., 5
 — Nelson v., 156
 — Powell v., 672
 — v. Rose, 510
 — Spinks v., 632
 — Utterton v., 63
 Robinson, *In bonis* (1 Hag. 643), 54
 — *In bonis* (1 P. & D. 334), 10
 — *In bonis* (2 P. & D. 171), 12
 — *In re*, 377
 — *In re*; Wright v. Tugwell, 310
 — v. Addison, 113, 114
 — Bentley v., 672
 — Brandon v., 422
 — Burgees v., 496
 — v. Burke, 198
 — Buttery v., 409
 — v. Chamberlayne, 53
 — v. Cleator, 406
 — Cuthbert v., 172
 — Dickson v., 94
 — Doe d. Jeff v., 347
 — v. Duagate, 395
 — Eustace v., 600
 — v. Evans, 291
 — v. Geldard, 668
 — v. Gray, 340

- Robinson v. Hunt, 414, 581
 — Jones v., 175
 — Knight v., 163
 — Leake v., 461, 482
 — v. London Hospital, Governors of, 211, 321
 — v. Lowater, 374
 — Margary v., 26
 — Mason v., 417
 — Milliner v., 345
 — v. Needham, 679
 — v. Nevill, 141
 — v. Ommanney, 13
 — v. Robinson, 345, 348
 — v. Shaw, 245, 246
 — Shearman v., 383
 — v. Shepherd, 254
 — v. Smith, 291
 — Stent v., 151
 — v. Sykes, 253
 — Thompson v., 265
 — v. Tickell, 405
 — v. Waddelow, 275
 — v. Wharrey, 342
 — v. Wheelwright, 90, 452
 — v. Wood, 525
 Robley v. Ridings, 258
 — v. Robley, 125
 Robson, *In re*; Emley v. Davidson, 10, 314, 319
 — *In re*; Robson v. Hamilton, 166, 191
 — v. Hamilton, 166, 191
 — Naylor v., 555
 — Rickard v., 298
 Roch v. Cullen, 122, 125
 — Tombs v., 666
 — Tunaley v., 607
 Roche, Moore v., 399
 Rochford v. Hackman, 147, 422, 507
 Rochfort v. Fitzmaurice, 598
 — Sperling v., 201
 Rockcliffe, Welby v., 118, 676, 679
 Rocke v. Rocke, 507
 Roddy v. Fitzgerald, 348, 350, 352, 354, 610
 Roden v. Smith, 152
 — Underhill v., 326, 344, 457
 Rodger, Pickersgill v., 87
 Rodhouse v. Mold, 142
 Rodon, Israel v., 35, 55, 56
 Roe d. Aistrop v. Aistrop, 343
 — d. Dodson v. Grew, 355
 — d. Fox, Marston v., 55, 56
 — d. James v. Avis, 180
 — d. Ryall v. Bell, 103
 — v. Scott, 585
 — d. Sheers v. Jeffery, 586
 — v. Summerset, 606
 — d. Thong v. Bedford, 348
 — d. Walker v. Walker, 172
 Roffey v. Bent, 508
 — v. Early, 118
 Rogers, *Ex parte*, 609
 — Earl of Albemarle v., 170
 Rogers, Baldwin v., 482
 — Gaskin v., 100, 168, 668
 — v. Goodenough, 43, 59
 — Griffith v., 654
 — v. Jones, 87
 — Martineau v., 462, 535
 — Massey v., 389, 498
 — v. Maule, 649
 — v. Mutch, 258
 — v. Rogers, 402, 531
 — Rose v., 633
 — v. Thomas, 159
 — v. Towsie, 556
 Rolfe, Emperor v., 564
 — v. Perry, 138
 Rolland, Paterson v., 332
 Rolls, Inman v., 153
 Rolt v. Lord Somerville, 428
 Romaine v. Onslow, 626
 Romans v. Mitchell, 294
 Romilly v. James, 337
 Romney, Lord, Foster v., 419, 457
 Rood, Cusack v., 236
 Rook v. A.-G., 251
 Rooke, Brooke v., 673
 — v. Rooke (2 Dr. & S. 38), 206
 — v. Rooke (2 Vern. 461; 1 Eq. Ab. 210, pl. 17), 179
 Roose, *In re*; Evans v. Williamson, 166
 — v. Chalk, 652, 654
 Rootes, *Re*, 279
 Rooth, Askew v., 161
 Roper, *In re*; Roper v. Doncaster, 664
 — *In re*; Taylor v. Bland, 665
 Roper's Estate, *In re*; Morrell v. Gissing, 558
 — Trusts, *In re*, 385
 Roper, Bilke v., 60, 107
 — v. Doncaster, 664
 — v. Roper (L. R. 3 C. P. 32; 36 L. J. C. P. 27; 37 *ib.* 7), 345, 346
 — v. Roper (3 Ch. D. 714), 660
 Roper Curzon v. Roper Curzon, 387
 Rorke, Archer v., 512
 Rose, *In bonis*, 44
 — v. Bartlett, 182, 183
 — v. Cunynghame, 54
 — Robins v., 510
 — v. Rogers, 633
 — Simmons v., 677
 — d. Vere v. Hill, 336, 556
 Roseingrave v. Burke, 144
 Roshier, *In re*; Roshier v. Roshier, 504
 — v. Roshier, 504
 Ross's Trust, *Re*, 517
 — v. Borer, 414
 — Cunningham v., 130;
 — Hicks v., 414
 — Munby v., 436
 — v. Ross (20 B. 645), 252, 268

- Ross v. Ross (2 Coll. 269), 595
 Rossborough, Boyse v., 22
 Rosser, Evans v., 499
 Rossiter, *In re*; Rossiter v. Rossiter, 141
 — v. Rossiter, 141
 Rotheram v. Rotheram, 356
 — Wilkins v., 659, 660
 Rothea, Earl of, Leslie v., 589
 Rothwell, Greenwood v., 356
 — Howarth v., 416
 Round, Harrison v., 589
 — v. Pickett, 422
 Rous, Cambridge v. (25 B. 409), 526, 536, 558
 — Cambridge v. (25 B. 574), 396
 — Cambridge v. (8 Ves. 12), 188, 529
 — v. Jackson, 486
 — Lord, Tower v., 678
 Rouse, Doe d. Gains v., 223
 Rouse's Estate, 465
 Routh, Johnson v., 443, 448
 Routledge v. Dorril, 489
 — Trollope v., 666
 Row's Estate, *In re*, 551
 Row, Collingwood v., 217
 — v. Row, 663
 — Wells v., 677
 Rowbotham v. Dunnett, 65, 66
 Rowe, A.-G. v., 7
 — Bright v., 536, 559
 — Dixon v., 508
 — v. Rowe, 446, 630, 678
 Rowen, Massey v., 513, 514
 Rowland, Coxen v., 201, 202
 — v. Edwards, 106
 — v. Gorsuch, 270
 — v. Morgan, 592
 — v. Tawney, 460
 — Ware v., 288
 — Wigan v., 100
 Rowles v. Mayhew, 666
 Rowlett, Osborne to, 78, 368
 Rowley, Appleton v., 390, 511
 — Barnes v., 410
 — v. Eyton, 60
 — Harrison v., 292
 Roxburgh v. Fuller, 124
 Royal National Lifeboat Institution,
 Buckley v., 316
 — Panopticon, Clark v., 375
 Roylance v. Lightfoot, 185
 Royle, Doe d. Patrick v., 253
 Ruastle, Doe d. Cannon v., 340, 355
 Rucker, Furneaux v., 148
 Rudall, Simmons v., 33, 194
 — Warren v. (1 J. & H. 1), 88, 430
 — Warren v. (4 K. & J. 603), 527
 Rudge v. Barker, 559
 — v. Winnall, 166, 465
 Ruding's Settlement, *In re*, 199
 Rudstone v. Anderson, 131
 Ruff v. Silvers, 457
 Ruffle v. Medlock, 153
 Rufford, Clay v., 369
 Rugg, Weakley d. Knight v., 575
 Rule, *In bonis*, 70
 Rumney, Sawrey v., 123
 Rumsey, Gibbs v., 213, 294, 406
 Russell, *In bonis* (15 P. D. 111), 35, 36
 — *In bonis*; *In bonis* Laird ([1892] P. 380), 81
 — *In re* (53 L. J. Ch. 400; 52 L. T. 559), 392, 419, 519
 — *In re*; Russell v. Chell, 132
 — v. Buchanan, 454, 455
 — v. Chell, 132
 — v. Dickson, 123
 — Flood v., 47
 — v. Jackson, 65, 324
 — v. Kallett, 304, 305
 — London, Lord Mayor of, v., 124
 — Randall v., 518
 — Ravald v., 434
 — v. Russell, 204, 232
 — v. St. Aubyn, 626, 627
 — Strode v., 184, 232
 — Williams v., 461, 471
 Rust v. Baker, 543
 Rutherford v. Maule, 52
 Rutland, Gage v., 458
 Rutter, Pearson v., 524
 Ryall v. Bell, 103
 — v. Hannam, 222
 Ryan v. Cowley, 352
 — Jones v., 583
 — and Kavanagh, *In re*, 376
 — v. Keogh, 404, 415
 Rycroft v. Christy, 512
 Ryde, *In bonis*, 70
 Ryder, *In bonis*, 80
 — Bute, Marquess of, v., 437, 594
 — Faversham, Mayor of, v., 318
 Rye's Settlement, 582, 584
 Rye v. Rye, 470, 471
 Rymer, *In re*; Rymer v. Stanfield, 305
 — v. Clarkson, 52
 — v. Harpiey, 261, 359
 — Redman v., 376
 — v. Stanfield, 305
 Ryves v. Ryves, 333, 657

 SABERTON v. Skeels, 390
 Sabin v. Heape, 373
 Sackville v. Smyth, 141
 — West v. Holmeadale, Viscount, 599, 601
 Sadler, Knowles v., 125

- Sadler v. Rickards, 157
 — Sutton v., 14, 21
 — v. Turner, 655
 — Webb v., 390, 397, 436
 Sadlier v. Butler, 93
 Saffery, Parsons v., 294
 St. Albans, Duke of, v. Beaucherk,
 123, 124
 St. Aubyn, Russell v., 626, 627
 St. Catharine's Coll., Farrer v., 43,
 226, 613, 659
 St. George, Trench v., 436
 St. George's Hospital, Churchill v.,
 128
 St. John, Whitbread v., 263
 St. Leonards, Lord, Sugden v., 46,
 47
 St. Sauveur, Sharp v., 19, 99
 St. Vincent, Lord, Beech v., 493
 Sale, Crompton v., 632
 — v. Moore, 399
 Salisbury, Marquis of, Beaumont v.,
 361
 — Edge v., 271, 302
 — v. Lamb, 556
 — v. Petty, 541
 — v. Ridley, 570
 Salkeld v. Vernon, 581
 Sallery, *Re*, 577
 Sallitt, Hicks v., 169
 Sallory v. Leaver, 410
 Salmon v. Salmon, 484
 Salomons, Stokes v., 175
 Saloway, Edwards v., 640
 Salt, Andrews v., 85
 — Carter v., 417
 — v. Chattaway, 212, 676
 — Evans v., 280
 — v. Pym, 620
 Salter, *Re*; Farrant v. Carter, 168
 — v. A.-G., 466
 — Barlow v., 586
 — Jones v., 516
 — Pile v., 457
 Saltmarsh v. Barrett, 294, 652
 Salusbury v. Denton, 271, 307, 319
 Salvin v. Weston, 418
 Sambourne v. Barry, 596
 Samford, Boucher v., 172
 Sams v. Garlick, 339
 Samson, Heath v., 7
 Samuel v. Samuel (12 Ch. D. 152),
 510
 — v. Samuel (14 L. J. Ch. 222; 9
 Jur. 222), 393, 598
 — v. Ward, 624
 Sanicroft, Stolworthy v., 472
 Sandeman v. Mackenzie, 234
 Sanders' Trust (L. R. 1 Eq. 675),
 235, 525, 570, 571, 581
 Sanders v. Ashford, 580, 644
 — v. Bromley, 442
 — v. Franks, 390
 — v. Kiddell, 156
 — Napper v., 522
 Sanderson's Trust, *In re*, 406
 Sanderson v. Bayley, 266
 — v. Dobson, 175
 — Stewart v., 388
 — Wright v., 27, 69
 Sandes v. Cooke, 354, 356
 Sandford, Langham v., 653
 — v. Vaughan, 54
 Sandom, Billings v., 530
 — Scriven v., 200
 Sinds, A.-G. v., 650
 — v. Lyne, 662
 Sandwich, Earl of, Montagu v. (33 B.
 324), 160
 — Earl of, Montagu v. (32 Ch. D.
 525), 628
 Sandys, Campbell v., 74
 — Wilday v., 377
 Sanford v. Irby, 173, 533
 — v. Raikes, 101
 Sansbury v. Read, 468
 Sarel, *Re*, 515
 Sargent, Turner v., 602
 Sargon, Stubbs v., 64, 402
 Saril v. Saril, 253
 Sarjeant, *Re*, 534
 Sartoris's Estate, *In re*; Sartoris v.
 Sartoris, 508
 Sartoris v. Sartoris, 508
 Satterthwaite, Seyton v., 327
 Saumarez v. Saumarez, 175
 Saunders, *In bonis* (31 L. J. P. 53),
 29
 — *In bonis* (1 P. & D. 16), 51,
 52
 Saunders' Trusts, *In re* (3 K. & J.
 152), 285, 569
 Saunders v. Boyd, 236
 — Bustard v., 327
 — Earlom v., 211
 — v. Eppe, 361
 — Morley v., 433
 — v. Richardson, 232
 — v. Vautier, 464, 507
 — -Davies, *In re*; Saunders-
 Davies v. Saunders-Davies,
 663
 — -Davies v. Saunders-Davies,
 663
 Savage's Trusts, *In re*, 195
 Savage, *In bonis*, 43
 — Ayscough v., 252
 — Jeyes v., 469, 541, 575
 — Mahon v., 302
 — v. Robertson, 240
 — v. Tyers, 397
 Savile v. Yeatman, 228
 Saville, Asquith v., 544
 — Stoddart v., 285
 Savory, Peek v., 482
 Sawrey v. Rumney, 123
 Sawtell, Hernando v., 4, 199
 Sax, *In re*; Bamed v. Sax, 503
 — Bamed v., 503
 Saxton v. Saxton, 132

- Say v. Creed, 282
 — Lord, Jones v., 358
 Sayer's Trusts, *In re*, 477
 Sayer, Hughes v., 585
 — Innes v., 206
 — Wills v., 512
 — Milward, Holmes v., 170
 Sayers, *Ex parte*; *In re* Belfast Town Council, 554
 Scaife, Mirehouse v., 659
 Scalé v. Rawlins, 608, 609
 Scales v. Heyhoe, 215
 — Masters v., 546
 Scammell v. Wilkinson, 16
 Scanlan, *In re*, 85
 Scarancke, Cotton v., 265
 Scarborough v. Borman, 516
 — Earl of, Doe d. Lumley v., 589, 591
 — v. Scarborough, 457
 — Earl of, Scott v., 148, 264
 Scarfe, Casborne v., 184
 Scarisbrick v. Skelmersdale (17 Sim. 187), 489
 — v. Lord Skelmersdale (4 Y. & C. Ex. 78), 233
 Scarlett v. Lord Abinger, 503
 Scarsdale, Lord, v. Curzon, 593
 Scarth, *In re*, 169
 Scawin v. Watson, 397
 Schenck v. Agnew, 530
 Schloss v. Stibel, 227
 Schneider, Wilkinson v., 200
 Schofield v. Heap, 632
 Scholesfield v. Redfern, 447
 School for Indigent Blind, Nether-sole v., 322
 Schroder v. Schroder, 95
 Schwarz, Hill v., 13, 664
 Schweder's Estate, *In re*; Oppenheim v. Schweder, 660
 Schweder, Oppenheim v., 660
 Score, *Re*; Tolman v. Score, 343
 — Tolman v., 343
 Sootney v. Lomer, 208, 464, 465
 Scott, *In re*; Scott v. Hanbury, 201
 — v. Alberry, 176
 — Banks v., 219
 — v. Bargeman, 612
 — v. Best, 143
 — v. Brownrigg, 64, 65, 299
 — Cole v., 106
 — v. Cumberland, 659, 662, 666
 — Dawes v., 675
 — Dimes v., 447
 — Doe d. Wells v., 179
 — Evans v., 458
 — v. Forristall, 657
 — v. Hanbury, 201
 — v. Harwood, 280
 — v. Izon, 383
 — v. Jones, 669
 — v. Josselyn, 395
 — v. Key, 404
 Scott v. Leak, 409
 — Mather v., 320
 — v. Moore, 193
 — Packer v., 482
 — Paterson v., 658, 667
 — v. Rhodes, 52, 53
 — v. Roach, 520
 — Roe v., 585
 — v. Scarborough, Earl of, 148, 264
 — v. Scott (11 Ir. Ch. 114), 326
 — v. Scott (9 L. R. Ir. 367), 219
 — v. Scott (1 Sw. & T. 258), 37
 Scottish Widows' Fund v. Craig, 409
 Scoular v. Plowright, 22
 Scowcroft, Bowen v., 531
 Scrafton, Kenebel v., 55, 238
 Scripps, Clarke v., 45
 Scriven, Playne v., 24
 — v. Sandom, 200
 Scriven, Wicks v., 435
 Scudamore, Doe d. Planner v., 455
 Sculthorpe v. Tipper, 377
 Scurr, Spencer v., 429
 Seago, Chaston v., 537, 554, 567
 Seagram v. Knight, 427
 Seal, *In re*; Seal v. Taylor, 103
 — v. Taylor, 103
 Seale v. Barter, 346
 — Jodrell v., 243
 — v. Seale, 391, 598, 623
 — Hayne v. Jodrell, 243, 596
 Sealey v. Stawell, 598
 Seaman, *In bonis*, 70
 — v. Wood, 484
 Searle v. Cooke, 432
 Seaward, Druiitt v., 288
 — v. Willock, 488
 Seawell, Bond v., 25
 Sebright, Baker v., 425
 Sebthorp, *In bonis*, 70
 Seccombe v. Edwards, 572
 Secretary of State for India, Walsh v., 476
 Seifferth v. Badham, 287
 Selby, Ellis v., 187, 406
 — Hind v., 446
 — Knight v., 340, 341
 — v. Whitaker, 460
 Seley v. Wood, 653
 Sellon v. Watts, 657
 Selsey, Lord, v. Lake, Lord, 250
 Selwood v. Mildmay, 111
 Sergeant, *In re*; Mertens v. Walley, 231
 Serocold v. Heming, 60
 Serres' Estate, *Re*; Venes v. Marriott, 228
 Severne, Hall v., 195
 Seward, Field v., 636
 — Mills v., 350

- Sewell's Estate, *In re*, 444
 Sewell v. Bishopp, 376
 — Clarke v., 151
 — Cole v., 478
 — v. Crewe-Read, 319
 — Lane v., 165
 — Legatt v., 349
 — Mackinnon v., 528
 Seymour's Case (10 Rep. 956), 520
 — Case (Com. Rep. 543; 1 P. W. 346; 2 Vern. 742), 46
 — Case (3 Curt. 530), 52
 — Trusts, *Re*, 292
 Seymour, Clark v., 369
 — Coleman v., 234, 262
 — v. Kilbee, 608
 — v. Lucas, 509
 — Polley v., 210
 — Reith v., 395
 — Thynne v., 674
 — v. Vernon, 506
 — Wallace v., 615
 Seyton, *In re*; Seyton v. Satterthwaite, 327
 — v. Satterthwaite, 327
 Shackel, Poulter v., 183
 Shadbolt v. Thornton, 313
 Shaftesbury, Earl of, v. Marlborough, Duke of, 125, 437
 — Earl of, Webb v., 90
 Shaftsbury v. Shaftsbury, 127, 130
 Shailer v. Groves, 251, 557
 Shakespear, Thomson v., 98, 296, 477
 Shalcross v. Palmer, 47
 Shalcross v. Finden, 671
 — v. Wright, 214
 Shand v. Kidd, 540
 Shanley v. Baker, 595
 Shannon v. Bradstreet, 435
 — v. Good, 356
 — James v., 605, 607
 Sharman, *In bonis*, 50, 100
 Sharp, *In re*; Rickett v. Sharp, 379
 — Briggs v., 169, 404
 — v. Cosserat, 510
 — Guy v., 128
 — v. Lush, 665
 — Rickett v., 379
 — v. St. Sauveur, 19, 99
 — Sutton v., 190
 Sharpe v. Crispin, 5, 7
 — v. Sharpe, 185
 Sharshaw v. Gibbs, 433
 Shaw, *In bonis*, 46
 — *Ex parte*, 185
 Shaw's Trusts, *In re*, 379
 Shaw, *In re*; Robinson v. Shaw, 245, 246
 — Blake v., 167
 — v. Borrer, 373, 671
 — v. Ford, 505
 — v. Jones-Ford, 395, 437, 506, 519, 520
 Shaw v. Lawless, 86
 — v. MacMahon, 644, 645
 — v. Neville, 28
 — v. Rhodes, 490
 — Robinson v., 245, 246
 — v. Shaw, 555
 Sheard, Sykes v., 369
 — Tolson v., 380
 Shearman v. Robinson, 383
 Shearn, *In bonis*, 34
 Sheath v. York, 56
 Sheddon, Du Hourmelin v., 99
 — v. Godrich, 54, 96
 — Hawthorn v., 199, 663
 Sheers v. Jeffery, 586
 Sheffield v. Coventry, Earl of, 524
 — v. Kennett, 575
 — Maas v., 18
 — v. Orrery, Lord, 451, 457
 — v. Von Donop, 110
 Sheldon, *In re*; Nixon v. Sheldon, 444
 — v. Dormer, 674
 — Gardner v., 604, 605
 — and Kemble, *Re*, 519
 — Nixon v., 444
 — v. Sheldon, 10, 70
 Shelford v. Acland, 197, 199
 Shelley's Case, 347, 348, 350, 351, 354, 410
 Shelley v. Bryer, 265
 — v. Edlin, 360
 — Gill v., 240
 — v. Shelley, 402, 599
 — Sidney v., 646
 Shelmerdine, Ramsay v., 194, 644, 649
 Shelton v. Watson, 598
 — Wright v., 178
 Shenton, Denn d. Gearing v., 342
 Shephard, Newland v., 607
 Shephard, *In bonis*, 189
 — v. Beetham, 312, 666, 668
 Shepherd, *In re*; Churchill v. St. George's Hospital, 128
 — Challenger v., 340
 — Elton v., 394
 — Halfhead v., 610
 — v. Ingram, 147, 250, 255
 — Knollys v., 184
 — v. Nottidge, 400
 — Robinson v., 254
 Shepherdson v. Dale, 334
 Sheppard, Howlin v., 434
 — v. Sheppard, 417, 418
 Sheraton's Trusts, *In re*, 477
 Sherborne, Lord, Ogle v., 227, 234
 Sherer v. Bishop, 249
 Shergold v. Bone, 542
 — v. Shergold, 11
 Sheridan, *In re*, 177
 Sherratt v. Bentley, 420, 618
 — Birch v., 417
 — Leeming v., 468, 537, 552, 557, 580

- Sherratt v. Mountfield, 265
 — v. Oakley, 613
 Sherson, Bothamley v., 114, 184
 Sherwin v. Kenny, 341
 Sheward, *In re*; Sheward v. Brown, 508
 — v. Brown, 508
 Shewell v. Dwarries, 513
 Shiers v. Ashworth, 645
 Shillingford, Penfold v., 430, 439
 Shillito, Barraclough v., 268
 Shingler v. Pemberton, 11
 Shipman, Fox v., 175
 Shippard, Doe d. Watson v., 524
 Shires v. Glascock, 29
 Shirley's Trusts, *Re*, 595
 Shirt v. Westby, 149
 Shore, Humble v., 195
 — Patch v., 199
 — Walker v., 256
 — v. Wilson, 101
 Short, Long v., 118, 663
 — v. Smith, 38
 Shotter, Doe v., 365
 Shovelton v. Shovelton, 403
 Showler, Burgoyne v., 69
 Shrewsbury v. Hornby, 299
 — Earl of, v. North Staffordshire Railway, 436
 — v. Shrewsbury, 435
 — Earl of, Talbot v. (4 M. & Cr. 672), 83
 — Talbot v. (Prec. Ch. 394), 629
 Shrimpton, James v., 37
 — v. Shrimpton, 454, 462
 Shuldam v. Smith, 456
 Shum v. Hobbs, 462
 Shute v. Hogge, 487, 511
 Shuttleworth, West v., 299, 300
 Sibbon, Calvert v., 292
 Sibley's Trusts, *In re*, 254, 269, 292, 543, 544, 547, 548
 Sibley v. Cook, 640
 — v. Perry, 113, 168, 267, 639
 Sibthorp v. Moxom, 639
 Siddall, Rackham v., 360
 Sidebotham v. Watson, 116, 357
 Sidgreaves v. Brewer, 64, 100, 188, 300
 Sidgwick, Kennedy v., 574
 Sidney v. Shelley, 646
 — v. Sidney, 116, 129
 — v. Wilmer, 146
 Siggers, Gray v., 444
 Sikes, Lockwood v., 507
 — v. Snaith, 53
 Silcox v. Bell, 267
 Sillick v. Booth, 537, 559, 563
 Silverside v. Silverside, 635
 Silvester v. Jarman, 163
 Simcock, Johnson v., 572
 Simkin, Moore v., 277, 279
 Simmonds v. Cocks, 454
 — Palmer v., 399
 Simmons v. Norton, 426
 Simmons v. Pitt, 646
 — v. Rose, 677
 — v. Rudall, 83, 194
 — v. Simmons, 603
 — v. Vallance, 112
 Simms, Hannam v., 542
 — Finch v., 631
 Simon v. Barber, 305
 Simonsen, Meyer v., 444, 447
 Simpson, *In bonis*, 45
 — *In re*, 384
 — Acey v., 660
 — v. Ashworth, 336
 — Avison v., 187, 281
 — v. Beard, 167
 — Doe v., 362
 — Doe d. Blesard v., 341, 574
 — Doe d. Simpson v., 574
 — Doe d. White v., 362
 — Freeman v., 150
 — Greaves v., 353
 — v. Hornsby, 605
 — Hutton v., 604
 — v. Lister, 444, 445
 — M'Clean v., 608
 — v. Peach, 460
 — Pearsall v., 456
 — v. Simpson, 428
 — Thompson v., 200
 — Tilley v., 175, 176
 — v. Vickers, 502
 — Walker v., 467, 470
 Sims v. Quinlan, 300, 308
 Simson, Longdon v., 491
 Sinclair's Trust, *In re*, 299
 Sindrey, Holt v., 239, 241, 245
 Sing v. Leslie, 208, 237
 Singleton v. Gilbert, 260
 — v. Tomlinson, 61, 63, 168, 212, 260
 Sinnett v. Herbert, 306, 319, 323
 Sinnott v. Walsh, 76, 263, 275
 Sison, Mackinley v., 110, 207
 Sitwell v. Barnard, 448
 Sivers, Ruff v., 457
 Skeats, Belbin v., 69
 Skeels, Saberton v., 390
 Skelmersdale, Lord, Scarisbrick v. (17 Sim. 187), 489
 — Lord, Scarisbrick v. (4 Y. & C. Ex. 78; 2 H. L. 167), 233
 Skerrett's Trusts, *In re*, 215
 Skey v. Barnes, 612
 Skingley, *In re*, 430
 Skinner's Trust, *In re*, 405
 Skinner, Jones v., 180
 — v. Ogle, 60
 Skipper v. King, 469
 Skipworth, Green v., 53
 Skirrow, Bristow v., 202
 Skirving, Hepburn v., 106
 — v. Williams, 446
 Skottowe v. Young, 239
 Skrymsher v. Northcote, 194

- Sladden, *Pratt v.*, 652, 654
 Slade *v.* Fooks, 266
 — *v.* Milner, 530
 — *v.* Walpole, 116
 Sladen *v.* Sladen, 276
 Slaney *v.* Slaney, 534
 — *v.* Watney, 292
 Slark *v.* Dakyns, 485, 486
 Slater *v.* Dangerfield, 344, 356
 — Denn *v.*, 337
 — Gardiner *v.*, 500
 — Milnes *v.*, 652, 654, 657, 675
 — Oldman *v.*, 653
 Slatter *v.* Noton, 131
 Slattery *v.* Ball, 575
 — O'Hea *v.*, 260, 328
 — Phelan *v.*, 223, 301
 Slee, Croft *v.*, 196
 Sleet *v.* Thornton, 113, 228
 Sleeman *v.* Wilson, 83
 Slevin, *In re*; Slevin *v.* Hepburn,
 304, 305
 Slight, Cooper *v.*, 368, 387
 Slingsby *v.* Grainger, 108, 109, 161
 Slinn, *In bonis*, 11
 Sloper, Alcock *v.*, 446
 — *v.* Oliver, 133
 Smaling, *In re*; Johnson *v.* Smaling,
 532
 — Johnson *v.*, 532
 Small, Dawson *v.*, 304, 308, 577
 — *v.* Torley, 301
 — *v.* Wing, 674
 Smallman *v.* Goolden, 116
 Smallwood, Walker *v.*, 372
 Smart, *In bonis*, 68
 Smart's Estate, *In re*; Fox *v.* Ship-
 man, 175
 Smart *v.* Clark, 530
 — *v.* Tranter, 68
 Smeddle, Doe d. Littledale *v.* 337
 Smee *v.* Smee, 14
 Smeed, *Re*; Archer *v.* Prall, 386
 Smiles *v.* Blackburn, 75, 107, 208
 Smith, *In bonis* (1 P. & D. 717), 12
 — *In bonis* (15 P. D. 2), 30, 100
 — *In bonis* (16 W. R. 1130), 69
 Smith's Case, 62
 Smith, *Re* (2 J. & H. 594), 256, 613,
 617
 — Sophia, *In re* (58 L. J. Ch.
 661), 334
 — *Re*; Bashford *v.* Chaplin, 595,
 622
 — *In re*; Bence *v.* Smith, 484
 — *In re*; Bilke *v.* Roper, 60,
 107
 — *In re*; Chapman *v.* Wood,
 516
 — *In re*; Harrington *v.* True,
 141
 — *In re*; Keeling *v.* Smith, 502
 — *In re*; Lord *v.* Hayward, 247
 Smith's Estate, *In re* (4 Ch. D. 70),
 186
 Smith's Estate, *In re* (27 L. R. Ir.
 121), 337
 — Estate, *In re*; Clements *v.*
 Ward, 322
 — Trusts, *In re* (9 Ch. D. 117),
 644
 — Trusts, Betty, *In re* (L. R. 1
 Eq. 79), 456, 606
 — Will, 468
 Smith *v.* Adkins, 77
 — *v.* Barneby, 289
 — *v.* Bence, 482, 484, 522
 — Bon *v.*, 284
 — Brookman *v.*, 277, 279, 522,
 529
 — Brown *v.* (15 B. 444), 6
 — Brown *v.* (10 Ch. D. 377), 386
 — *v.* Butcher, 280
 — *v.* Butler (1 J. & L. 692), 161
 — *v.* Butler (3 J. & L. 565), 158
 — *v.* Campbell, 271
 — Chambers *v.*, 408
 — *v.* Charles, 570
 — *v.* Claxton, 214
 — *v.* Colman, 533
 — *v.* Conder, 64, 635
 — *v.* Coney, 226
 — *v.* Cowdery, 501
 — *v.* Crabtree, 620, 635
 — *v.* Cunningham (1 Add. 488),
 43
 — *v.* Cuninghame (13 L. R. Ir.
 480), 489
 — *v.* Davis, 189
 — Davy *v.*, 29
 — Doe d. Candler *v.*, 350
 — Doe d. Chattaway *v.*, 273
 — d. Dormer *v.* Parkhurst, 451
 — Douglas *v.*, 53
 — Dowding *v.*, 251
 — Dungannon, Lord, *v.*, 477,
 482, 484
 — Elliott *v.*, 526, 529
 — Ellis *v.*, 24
 — Emuss *v.*, 103, 132, 170, 217
 — *v.* Evans, 24
 — *v.* Farr, 542
 — Farrow *v.*, 513
 — *v.* Fitzgerald, 117, 613
 — Forrester *v.*, 556, 556
 — Foster *v.*, 417, 418
 — Glover *v.*, 69
 — Goodacre *v.*, 22
 — *v.* Greenhill, 594
 — Gregory *v.*, 274, 275
 — *v.* Gue, 231
 — *v.* Harris, 25
 — *v.* Havers, 415
 — Holden *v.*, 519
 — *v.* Horsfall, 267
 — Hutchinson *v.*, 166
 — James *v.*, 241, 266
 — *v.* Jobson, 243, 244
 — Keeling *v.*, 502
 — *v.* Kerran, 81

- Smith v. King, 410
 — Kirkham v., 88
 — v. Liddiard, 265
 — Lister v., 12
 — Low v., 280
 — v. Lucas, 90, 97
 — v. Martin, 456
 — v. Milledge, 240
 — v. Moreton, 142
 — Mullins v., 114, 168, 189
 — Murfett v., 14
 — v. Oakes, 420
 — v. Oliver, 320
 — v. Osborne, 550
 — v. Palmer, 289, 290
 — v. Pepper, 270, 543
 — Potts v., 660
 — v. Pybus, 117
 — v. Ridgway, 103
 — Right d. Phillips v., 358
 — Roberts v., 94
 — Robertson v., 11
 — Robinson v., 291
 — Roden v., 152
 — Short v., 38
 — Shuldham v., 456
 — v. Smith (11 C. B. N. S. 121), 340, 362
 — v. Smith (5 Ch. 342), 484, 542
 — v. Smith (19 Ch. D. 277), 515
 — v. Smith (3 Giff. 121), 681
 — v. Smith (1 L. R. Ir. 206), 357
 — v. Smith (1 P. & D. 143), 27
 — v. Smith (8 Sim. 353), 541
 — v. Sopwith, 314
 — v. Spence, 92
 — v. Spencer, 535
 — Spire v., 123
 — v. Stewart, 531
 — v. Streatfield, 254
 — v. Tebbitt, 14
 — v. Vaughan, 472
 — Wagstaff v., 517
 — Walker v., 22
 — Wathen v., 681
 — v. Webber, 583, 584
 — Whitbread v., 433
 — v. Wilson, 101
 — Wrey v., 444
 Smither v. Willock, 526
 Smithson, Ackroyd v., 214
 — Hodgson v., 526
 Smithwick v. Heyden, 623
 Smiton, Fletcher v., 176
 Smyth, *Ex parte*, 236
 — Martin v., 669
 — v. Power, 579
 — Sackville v., 141
 — v. Smyth, 177
 — Pigott v. Smyth-Pigott, 595
 Smythe v. Smythe, 424
 Snaith, *In re*; Snaith v. Snaith, 153
 Snaith, Sikes v., 53
 — v. Snaith, 153
 Snape v. Nevile, 618
 Snaplin, Purse v., 113
 Snare, Hewett v., 656
 Snee, Blackmore v., 556
 Snelham, Bayley v., 241, 242
 Snell, Read v., 343, 391
 Snelling, Millikin v., 126, 519
 Snow v. Poulden, 453
 — v. Teed, 274, 281
 Snowball v. Proctor, 346
 Snowdon v. Dales, 407
 — Slate Quarries, Elias v., 429
 Soames v. Martin, 415
 Soane, Conduitt v., 256, 439
 Soar v. Dolman, 38
 Society for P. G. v. A.-G., 309
 Solicitor to Treasury, Vaucher v., 7, 239
 Solley v. Wood, 438
 Sollory v. Leaver, 409
 Solly v. Solly, 539
 Solomon v. Solomon, 138
 Solomon, Levy v., 238
 Somers, Lord, Pole v., 89
 Somerset, *Re* Duke of; Thynne v. Seymour, 674
 Somerville v. Lethbridge, 438
 — Londesborough, Lord, v., 674
 — Lord, Rolt v., 428
 — v. Somerville, Lord, 6
 — Lord, Somerville v., 6
 Soper, Page v., 390, 396
 Sopwith v. Maughan, 94
 — Smith v., 314
 Sorresby v. Hollins, 318
 Sotheran v. Denning, 42
 — Doe v., 330
 Souch v. Cowley, 450
 Soule v. Gerard, 573
 South v. Williams, 639
 — Wilkinson v., 584
 Southall, Jones v., 128, 129, 200
 — Walker v., 364
 Southam v. Blake, 253
 Southampton, Lord, v. Hertford, Marquis of, 479
 Southcot v. Watson, 653
 Southern, Goodtitle d. Radford v., 108
 Southey, Westwood v., 464, 580, 585
 Southgate v. Clinch, 279
 Southmolton v. A.-G., 309
 Southouse v. Bate, 394, 395
 Southwick v. Hayden, 232
 Soutten, Ingram v., 532, 557
 Sowerby's Trusts, *In re*, 640
 — v. Fryer, 426
 — Parker v., 95, 468
 Spalding v. Spalding, 622
 Sparhawk, Alcock v., 72
 Sparkes v. Cator, 626
 Sparks, Jackson v., 553

- Sparks, Patten v., 286
 — v. Restal, 547, 608
 Sparling v. Parker, 847, 392
 Sparrow, Doe d. Lifford v., 534, 557
 — v. Josselyn, 116, 117
 Speakman, *In re*; Unsworth v.
 Speakman, 541, 641, 643
 — v. Speakman, 281
 Spear, Bone v., 12, 53
 Spearing v. Buckner, 176
 Speight, Fordham v., 403
 Spence, Reynard v., 95
 — Smith v., 92
 — v. Spence, 347, 362
 Spencer, *Re*; Hart v. Manston,
 617
 — *In re*; Thomas v. Spencer,
 516
 Spencer's Case, 431
 — Will, *Re*, 65
 Spencer, Bagshaw v., 360, 523
 — Beales v., 512
 — v. Brighthouse, 147
 — v. Bullock, 472
 — Charlemont v., 17
 — v. Duckworth, 567
 — Le Farrant v., 164, 165
 — Pearson v., 173
 — Pickwell v., 339
 — v. Scurr, 429
 — Smith v., 535
 — v. Spencer (21 B. 548), 130
 — v. Spencer (8 Sim. 87), 236
 — Thomas v., 516
 — v. Ward, 250
 — v. Wilson, 212, 464
 Sperling, *In bonis*, 30
 — v. Rochfort, 201
 Spicer, Green v., 407
 — Middleton v., 652
 — Roberts v., 512
 — Vincent v., 423
 Spiller, *In re*; Spiller v. Madge,
 644
 — v. Madge, 644
 — v. Maude, 296
 Spink v. Lewis, 286
 Spinke, Maleverer v., 426
 Spinks v. Robins, 632
 Spire v. Smith, 123
 Spong v. Spong, 670
 Spooner's Trust, 192, 199
 Spooner, Hanbury v., 292
 — Manning v., 656, 657
 — Whateley v., 635
 Spotten, *In re*, 63
 Spragg, Richardson v., 540
 Sprackling v. Ranier, 263
 Spratley, Watson v., 315
 Sprigge v. Sprigge, 36
 Springett v. Jennings, 192
 — White v., 184, 287
 Springfield, *In re*; Chamberlin v.
 Springfield, 606
 — Chamberlin v., 606
 Sproule, Bouch v., 441, 442
 — v. Prior, 667
 Spurgeon, Woodhouse v., 606
 Spurling, Cleaver v., 500
 Spurrell v. Spurrall, 555
 Spurway v. Glyn, 118, 149
 Squire, Beaumont v., 501
 — Collier v., 189
 — Finch v., 316
 — Rabbeth v., 172, 611, 612
 — Wilson v., 305
 Stables, Blackburn v., 353
 Stacey, Harvey v., 207, 256
 Stackhouse, Timins v., 254, 547
 Stackpole v. Beaumont, 499, 500
 Stacpoole v. Stacpoole, 589
 Stafford, Earl of, v. Buckley, 410
 — Marquess of, Rex v., 577
 — v. Stafford, 16
 Stahlschmidt v. Lett, 660
 Stains, Halford v., 492, 494
 Stainton, Maclaren v. (3 D. F. & J.
 202), 144, 441
 — Maclaren v. (27 L. J. Ch.
 442; 4 Jur. N. S., 199),
 172
 — Taylor v., 512, 529
 Stallibrass, Want v., 365
 Stamford, Grey v., 239
 — Lord, Pickering v., 640, 648
 Stammers v. Elliott, 133, 134
 — v. Halliley, 661
 Stamper v. Pickering, 416, 417
 Standen v. Standen, 195, 196, 223
 Standley, *In bonis*, 26
 Standley's Estate, *Re*, 238
 Standley, Feakes v., 583
 Stanfield, Rymer v., 305
 Stanford v. Roberts, 439
 — v. Stanford, 256, 458
 Stanger, *Re*, Moorson v. Tate,
 406
 Stanhope's Trusts, *Re*, 393, 645
 Stanhope, Collingwood v., 236
 — Lane v., 170
 — v. Thacker, 674
 — Thynne, Lord, v., 37
 Stanley v. Bernes, 3, 8
 — Boardman v., 81
 — v. Coulthurst, 602
 — Hervey-Bathurst v., 233, 235
 — v. Jackman, 333, 600, 601,
 602
 — Lemayne v., 24
 — v. Lennard, 580
 — Miller v., 593
 — v. Stanley, 590
 — Webber v., 103
 Stannard, *In re*; Stannard v. Burt,
 280, 556
 — Bolton v., 374
 — v. Burt, 230, 556
 Stansfield, *In re*, 614
 Stanton, Foot v., 69
 — Humberstone v., 528

- Stanton v. Lambert, 68, 511
 Stapleton v. Stapleton, 620
 Stares v. Penton, 636
 Starkey v. Brooks, 402
 — v. Kyres, 271
 Starr v. Newberry, 286
 Stavens v. Barnard, 247
 Stawell, Sealey v., 598
 Stead v. Hardaker, 657, 658
 — v. Mellor, 398
 — v. Platt, 461, 550
 Stebbing v. Walkey, 249
 Stedham, *In bonis*; *In bonis* Dyke, 59
 Stedman v. Dunster, 497
 — Read v., 650, 652
 Steed v. Preece, 219
 Steedman v. Poole, 516
 Steel, Reece v., 488
 Steele, *In bonis*, 58
 — v. Midland Ry. Co., 178
 Steer, *In re*, 8
 Steere, Witta v., 441
 Steevens' Trusts, *In re*, 280, 281
 Steibel, Constables v., 52
 Steignes v. Steignes, 188, 189
 Stelfox v. Sugden, 418
 Stenlake, Doe d. Elton v., 349, 493
 Stent v. Robinson, 151
 Stephen v. Cunningham, 469, 514
 — v. Gadsden, 397
 — Pearson v., 252, 393, 546
 — v. Stephen, 455
 Stephens, Badrick v., 114
 — Finden v., 86
 — Hutchinson v., 340
 — Roberts v., 127
 — v. Stephens, 93
 — v. Taprell, 44
 — Wright v., 531
 Stephenson v. Dowson, 116, 161
 — Nettleton v. (8 De G. & S. 366), 494
 — Nettleton v. (18 L. J. Ch. 191), 251
 — v. Stephenson, 647
 Start v. Platel, 272
 Stevens' Will, *Re*, 185
 Stevens, Bray v., 673
 — Coates v., 75, 92
 — Cogan v., 214, 215
 — Cooper-Dean v., 295, 298, 475
 — Davie v., 345
 — Gardiner v., 607
 — v. Hale, 605
 — v. Pile, 235, 472
 — Pitman v., 168, 177
 Stevenson v. Abingdon, 266, 267, 498
 — v. Gullan, 254, 554, 555
 — v. Liverpool, Mayor of, 360, 518
 — v. Masson, 8, 632, 633
 Stewart, Freund v., 298, 310
 Stewart, *In bonis*, 61
 — Bowles v., 436
 — v. Denton, 116, 134
 — v. Green, 297
 — v. Jones, 541, 641, 643
 — v. Sanderson, 388
 — Smith v., 531
 — v. Stewart (15 Ch. D. 539), 686
 — v. Stewart (2 Moo. P. C. 193), 52
 Stidolph, Dickinson v. 41, 47
 Stiebel, Schloss v., 227
 Still v. Hoste, 223
 Stillman v. Weedon, 200
 Stirling, Peter v., 666
 Stobie, Hastilow v., 21
 Stock, Beauman v., 612
 Stockdale v. Nicholson, 291
 Stocken, *In re*; Jones v. Hawkins, 86
 — v. Stocken, 386
 Stocker v. Harbin, 54, 676
 Stockford, Peacock v. (3 D. M. & G. 73), 249
 — Peacock v. (7 D. M. & G. 129), 254
 Stockil v. Punshon, 63
 Stockley v. Parsons, 16
 Stocks v. Barré, 159
 — v. Doddsley, 292, 390
 Stoddart v. Grant, 42
 — v. Nelson, 266
 — v. Saville, 285
 Stogdon v. Lee, 514
 Stokes, *Re*; Parsons v. Miller, 658, 667, 672
 — v. Cheek, 411
 — v. Heron, 413
 — v. Holden, 99
 — v. Salomons, 175
 Stolworthy v. Sancerft, 472
 Stone's Estate, *In re*, 423
 Stone v. A.-G., 160, 306
 — Crowder v., 550, 560, 563, 584
 — De Geer v., 19, 99
 — v. Greening, 108, 170
 — v. Harrison, 148
 — Lacy v., 668
 — Lee v., 552
 — Lowndes v., 283
 — v. Maule, 574
 — v. Theed, 436, 438
 Stonehewer, Best v., 270
 Stoney, Loftus v., 175, 176
 — Vize v., 463, 613
 Stonor v. Curwen, 252, 598
 Stooke v. Stooke, 160
 Storr, Newmarch v., 141, 142
 Storril, Chalmers v., 94
 Storrs v. Benbow, 258, 263, 483
 Story, Baker v., 40, 616
 Stoughton, Browne v., 479
 — Lombe v., 171, 490

- Stovin, Frank v., 355
 Stow v. Davenport, 156
 Stowell, Thomas v., 317
 Stracey, *In bonis*, 13
 — Harvey v., 644
 Strachan, Bridges v., 616
 Strafford, Lord, Byng v., 519
 Stratheden and Campbell, *In re*,
 Lord; Alt v. Stratheden
 and Campbell, Lord, 306
 — and Campbell, Lord, Alt v.,
 306
 Strathmore v. Bowes, 425
 Stratton, Butler v., 270
 — Paine v., 391
 Straus v. Goldsmid, 299
 Streetfield v. Cooper, 176
 — Smith v., 254
 Streetley, *In bonis*, 29
 Street, May v., 649
 — v. Street, 660
 Stretch v. Watkins, 462
 Stretton v. Ashmall, 378
 — v. Fitzgerald, 505, 578,
 595
 Strickland v. Symons, 383
 Stringer's Estate, *In re*; Shaw v.
 Jones Ford, 395, 487, 506, 519,
 520
 Stringer v. Gardiner, 222
 — v. Harper, 143, 664, 665
 — v. Phillips, 556
 Strode, Casamajor v., 574
 — v. Falkland, Lady, 131
 — Maberley v., 549, 571
 — v. Russell, 184, 232
 Strong v. Goff, 342
 — Henry v., 407, 408
 — v. Ingram, 126
 — v. Teatt, 181
 Strother v. Dutton, 463, 547
 Stroughill v. Anstey, 364, 378,
 375
 Strugnell, Bolding v., 464
 Struthers v. Struthers, 131
 Strutton, Hooper v., 372
 Stuart, *In bonis*, 12
 — v. Babington, 486
 — v. Bute, Marquis of, 189
 — v. Cockerell, 480, 482
 — Walker v., 160
 — v. Wrey, 463, 464
 Stubbs, Hughes v., 10
 — v. Sargon, 64, 402
 Studd v. Cook, 101
 Studdart v. Von Steiglitz, 336
 Stummvoll v. Hales, 249
 Sturdy, Grange v. 239, 244
 Sturge, A.-G. v. 310
 — v. Great Western Railway Co.,
 288
 Sturges v. Pearson, 525
 Sturt, Burt v., 492, 657
 Sturton v. Whellock, 39
 Styth v. Monro, 290
 Suckling, Ingram v., 464
 Sudbury & Pointon Estates, *Re*;
 Vernon v. Vernon, 505
 Sudeley and Baines & Co., *In re*
 Lord, 480
 Sueter, Vick v., 339
 Suffolk, Earl of, Bindon, Lord, v.,
 529
 — Countess of, Hobart v., 401
 — Earl of, Horde v., 310
 — Jones v., 495, 496
 Sugden v. Alsbury, 441
 — v. St. Leonards, Lord, 46,
 47
 — Stelfox v., 418
 Suisse v. Lowther, 125
 Sulley v. Barber, 456
 Sullivan, Commissioners of Charitable
 Donations v., 303
 — v. Edgell, 467
 — v. Galbraith, 413
 — Irvine v., 64, 400, 402
 — v. Sullivan (I. R. 4 Eq. 457),
 102, 221
 — v. Sullivan (3 L. R. Ir. 299),
 29
 — v. Sullivan (1 Phillim. 348),
 56
 — Trye v., 19, 117
 Summers, *In bonis*, 26
 Summerset, Roe v., 606
 Sunderland, *In bonis*, 60, 61
 Surman v. Wharton, 511
 Surridge v. Clarkson, 270
 Surtees v. Hopkinson, 620
 — v. Parkin, 658
 — v. Surtees, 325
 Susannis' Trusts, *In re*, 263, 270,
 338, 639
 Sussex, Earl of, Leonard v., 349, 598,
 601
 Sutcliffe v. Howard, 253, 421
 — Must v., 53
 — v. Richardson, 495
 Sutherland, Oceanic Steam Naviga-
 tion Co. v., 380
 Sutherland, Casterton v., 263
 — v. Cooke, 119, 445
 Sutton, *In re*; Stone v. A.-G., 160,
 306
 — A.-G. v., 580
 — Baker v., 317
 — Cox v., 593
 — Haaker v., 572
 — Hotham v., 158, 189
 — v. Jewks, 499
 — Morrall v., 617
 — Queen's Coll. v., 113, 116
 — v. Sadler, 14, 21
 — v. Sharp, 190
 — v. Sutton, 537, 612, 613
 — v. Torre, 325
 Swabey v. Goldie, 253, 254
 Swaine v. Burton, 277
 — v. Kennerley, 238

Swallow v. Binns, 471
 — v. Swallow, 416
 Swan v. Holmes, 93
 Swann, Johnston v., 313, 317, 318
 Swannell, Martin v., 344
 Swatman, Dickinson v., 38
 Sweet, Dowset v., 221, 223
 — v. Herring, 352
 Sweetapple v. Bindon, 598
 — v. Horlock, 474
 Sweeting v. Prideaux, 594
 — v. Sweeting, 324
 Sweetland v. Sweetland, 24, 26, 30
 Swift v. Nash, 54
 — v. Swift (1 D. F. & J. 160), 182
 — v. Swift (11 W. R. 334; 32 L. J. Ch. 479), 595
 Swinburn v. Ainslie, 440
 Swinburne, *In re*; Swinburne v. Pitt, 205, 206
 — Berkeley v., 255, 404, 460
 — v. Pitt, 205, 206
 — v. Swinburne, 236, 237
 Swindells, Parr v., 580
 Swinden, *In bonis*, 33
 Swiney, Haig v., 394
 Swinfen v. Swinfen, 187, 188, 190
 Swinford, *In bonis*, 28
 Swinhoe, Grissell v., 90
 Swinstead, Taite v., 480
 Sydenham, Tregonwell v., 478, 646
 Syer v. Gladstone, 88
 Sykes, *In bonis*, 32, 33
 Sykes' Trusts, *Re*, 515
 — Robinson v., 253
 — v. Sheard, 369
 — v. Sykes (4 Eq. 200; 3 Ch. 801), 194, 649, 656
 — v. Sykes (13 Eq. 56), 479
 — Wrigley v., 374, 671
 Sylvester, Thomas v., 432
 Symes v. Green, 14
 Symonds, Beale v., 650
 — Green v., 130, 165
 — v. Marine Society, 313
 — v. Wilkes, 602
 Symons v. James, 672
 — Strickland v., 383
 Synge's Trust, 574
 Synge v. Halea, 333
 — v. Synge, 90

 TAAFFE v. Conmee, 549
 Taber, *In re*; Arnold v. Kayess, 135, 414, 515
 Tabois, Manton v., 127, 128, 164
 Tabor v. Brooks, 385
 — v. Prentice, 615
 Tagart v. Hooper, 43
 Taggart, Carter v., 121, 191
 — v. Taggart, 333, 600
 Tagore v. Tagore, 503

Tait, Gibbs v., 393
 — v. Lathbury, 365
 Taite v. Swinstead, 480
 Taitt, M'Lachlan v., 461, 471
 Talbot, Chandos, Duke of, v., 459
 — de Malahide, Lord, v. Moran, 382
 — Dicconson v., 436
 — Jackson v., 381
 — v. Jevers, 493
 — v. Marshfield, 387
 — v. O'Sullivan, 402
 — v. Radnor, Lord, 88
 — v. Shrewsbury (Prec. Ch. 394), 629
 — v. Shrewsbury, Earl of (4 M. & Cr. 672), 83
 — v. Talbot, 55
 Tamplin, *In bonis*, 71
 Tancred, A.-G. v., 321
 Tandy, *In bonis*, 81
 — *In re*; Tandy v. Taudy, 394, 395
 — v. Tandy, 394, 395
 Tanfield, Mattison v., 283
 Tanière v. Pearkes, 253
 Tankerville, Earl of, Bennett v., 348, 350
 Tann, *Re*, 218
 Tanner, *Ex parte*; *In re* Tiverton Market Act, 329, 330
 — *Re*, 386
 — v. Elworthy, 436
 — Halliwell v., 663
 Tanqueray-Willamae and Landau, *In re*, 359, 375, 672
 Tapley v. Eagleston, 104, 109, 110
 Tapner v. Marlott, 279
 Taprell, Stephens v., 44
 Tapster v. Holzapffel, 56
 Tarbottom v. Earle, 417
 Tarbuck v. Tarbuck, 529
 Tarbut, Tilbury v., 519
 Tardy, Lloyd v., 203
 Target v. Gaunt, 580
 Tarleton v. Bruton, 541, 641, 643
 Tarn v. Commercial Bank of Sydney, 71
 Tarrant's Trust, *In re*, 198
 Tarsey's Trust, *In re*, 514
 Tasker, Bradshaw v., 299
 Tassell, Barnaby v., 187, 249, 251, 253, 256, 544
 Tate v. Clarke, 356, 393
 — Moorsom v., 406
 Tatham v. Drummond (4 D. J. & S. 484), 318
 — v. Drummond (2 H. & M. 262), 149
 — Eno v., 140
 — v. Vernon, 194, 466
 Tatley, Midgley v., 480
 Tatlock, Finlason v., 547
 — v. Jenkins, 616, 677
 Tatnall v. Hankey, 1

- Taunton, Adams *v.*, 365
 Tavernor *v.* Grindley, 237, 648
 Tawney, Austin *v.*, 174
 — Rowland *v.*, 460
 Taylor, *In bonis* (1 Hag. 641), 53
 — *In bonis* (63 L. T. 230), 45
 — *In re*; Cloak *v.* Hammond, 222, 267
 — *Re*; Illsley *v.* Randall, 417
 — *Re*; Martin *v.* Freeman, 305, 307, 308, 317, 320
 — *Re*; Taylor *v.* Ley, 285, 649
 — *In re*; Taylor *v.* Wade, 132
 — *In re*; Whitby *v.* Highton, 16
 Taylor's Estate, *Re*; Tomlin *v.* Underhay, 634
 — Settlement, *Re*, 210
 Taylor, Ames *v.*, 389
 — Austen *v.*, 597
 — *v.* Bacon, 404
 — *v.* Beverley, 390, 555
 — *v.* Bland, 665
 — *v.* Cartwright, 634
 — Chambers *v.*, 276
 — Clark *v.* (1 Dr. 642), 304
 — *v.* Clark (1 Ha. 161), 447
 — *v.* Crisp, 496
 — Doe d. Harris *v.*, 578
 — Doe d. Newton *v.*, 103
 — Domville *v.*, 164
 — Festing *v.*, 157
 — Frayne *v.*, 216
 — *v.* Frobisher, 460
 — *v.* George, 400
 — Gillam *v.*, 302
 — Gossage *v.*, 343
 — *v.* Graham, 471
 — *v.* Harewood, Earl of, 588
 — *v.* Haygarth, 650, 652
 — Hepworth *v.*, 571
 — Hindle *v.*, 417, 595
 — Hope d. Brown *v.*, 167
 — *v.* Johnson, 153
 — King *v.*, 529
 — *v.* Lambert, 459, 463
 — *v.* Ley, 285, 649
 — Linley *v.*, 95, 315
 — Maden *v.*, 341, 553, 557, 558, 611
 — Malcolm *v.*, 581
 — Manning *v.*, 338
 — *v.* Martindale, 410
 — *v.* Meads, 17, 77, 511
 — *v.* Mogg, 656
 — Owthwaite *v.*, 388
 — *v.* Richardson, 221
 — Seal *v.*, 103
 — *v.* Stainton, 512, 529
 — *v.* Taylor (3 D. M. & G. 190), 214
 — *v.* Taylor (17 Eq. 324), 417, 418
 — *v.* Taylor (20 Eq. 155), 632
 — *v.* Taylor (8 Ha. 120), 155
 Taylor *v.* Taylor (10 Ha. 475), 128
 — *v.* Taylor (6 Sim. 246), 119, 671
 — *v.* Topham, 503
 — *v.* Wade, 132
 — *v.* Walker, 585
 — Wallis *v.*, 390
 Taynton, Critchett *v.*, 247
 Teague's Settlement, *In re*, 477, 487
 Teague *v.* Fox, 448
 — Goold *v.*, 132, 162, 216
 Teal, Bedford *v.*, 315, 316
 Teale, *Re*; Teale *v.* Teale, 569
 — *v.* Teale, 569
 — Williams *v.*, 268, 488
 Teape's Trusts, *In re*; 205, 206
 Teasdale *v.* Braithwaite, 401
 Teatt, Strong *v.*, 181
 Tebbitt, Barber *v.*, 292, 293
 Tebbitt, Smith *v.*, 14
 Tedlie, Hunter *v.*, 287
 Tee *v.* Ferris, 65
 Teed, Snow *v.*, 274, 281
 Telford, Johnson *v.*, 96
 Tempest *v.* Camoys, Lord, 371
 — De Trafford *v.*, 192, 193
 — *v.* Tempest, 668
 Templemoyle School, 305
 Templer, Lewis *v.*, 472, 478, 587
 — Waite *v.*, 291
 Templeton *v.* Martin, 101
 Tenant, *In re* Hutchinson and, 403, 404
 Tench *v.* Cheese, 490, 676
 Tennent *v.* Tennent, 180
 Tenney, *In bonis*, 42
 Tennison *v.* Moore, 236
 Tenny *v.* Agar, 337
 Terrible, *In bonis*, 59, 62
 Terry's Will, 274
 Terry *v.* Terry, 173
 Test, Deane *v.*, 114
 Tetley, *In re* Clay and, 373, 374
 Teulon, Thompson *v.*, 573
 Tew, Kimberley *v.*, 472
 Tewart *v.* Lawson, 491
 Teynham, Lady, *v.* Lennard, 84
 Thacker, Lindsell *v.*, 186
 — Neville *v.*, 604
 — Stanhope *v.*, 674
 Thackeray *v.* Hampson, 536, 573
 Thackwell, Moggridge *v.*, 124, 304, 310
 Tharel's Trusts, *In re*, 494
 Tharp, *In bonis*, 17, 19
 Tharp's Estate, *In re*, 551
 Thatcher's Trust, *Re* (26 B. 365), 460, 481
 — Trusts, *In re* (26 Ch. D. 426), 884
 Theakston *v.* Marson, 54
 Theebridge *v.* Kilburne, 391
 Theed's Settlement, *Re*, 234, 235
 Theed, Stone *v.*, 436, 438
 Thellusson *v.* Rendlesham, 277

- Theobald v. King, 444
 Theisger, Manning v., 122
 Thetford School Case, 308
 Thicknesse v. Liege, 575
 Thirtle v. Vaughan, 186
 Thistlethwayte's Trusts, 281
 Thomas, *In re*; Thomas v. Howell, 216
 — *In re*; Wood v. Thomas, 443
 — v. Bennett, 629
 — v. Beynon, 221, 225
 — v. Britnell, 671
 — Butt v., 608
 — Doe d. Herbert v., 395
 — Ellison v., 237
 — Groom v., 14
 — v. Howell (34 Ch. D. 166), 216
 — v. Howell (18 Eq. 198), 802, 803, 617
 — v. Howell (1 Salk. 170), 495
 — v. Jones, 75, 199, 200
 — Loring v., 247, 545
 — Lowe v., 158, 159
 — Mather v., 162
 — Morgan v. (6 Ch. D. 176), 129
 — Morgan v. (9 Q. B. D. 643), 269, 355
 — v. Phelps, 177
 — Pogson v., 103, 176
 — Priestman v., 71
 — Rogers v., 159
 — v. Spencer, 516
 — v. Stowell, 317
 — v. Sylvester, 482
 — v. Thomas (27 B. 537), 114
 — v. Thomas (6 T. R. 671), 225
 — Vaughan v., 298, 807, 323
 — v. Wall, 53
 — v. Wilberforce, 461
 — William d. Hughes v., 180
 — v. Williams, 371
 — Wood v., 443
 Thompson, *In bonis*, 28
 — *In re*; Bedford v. Teal, 815, 816
 — *Re*; Machell v. Newman, 290
 Thompson's Trust, *Re* (2 W. R. 518; 5 D. M. & G. 280), 543, 545
 Thompson's Trusts, *Re* (22 B. 506), 99
 — Trusts, *In re* (9 Ch. D. 607), 281, 283
 — Trusts, *Re* (5 De G. & S. 667), 574
 Thompson, Askew v., 151
 — Bibby v., 404
 — v. Browne, 10
 — v. Burra, 94, 95
 — Cawood v., 320
 — v. Clive, 546
 — v. Corby, 301
 — to Curzon, *Re*, 533
 — Driver v., 16
 — Duckett v., 600
 — v. Fisher, 598
 — Forster v., 671
 Thompson, Gowling v. (19 L. T. 242), 254
 — Gowling v. (11 Eq. 366), 544
 — v. Grant, 186
 — v. Griffin, 385
 — v. Harris, 665
 — Law v., 568
 — v. Lawley, Lady, 171, 182
 — Lewthwaite v., 348
 — Mann v., 258
 — Odium v., 432
 — v. Robinson, 265
 — v. Simpson, 200
 — v. Teulon, 573
 — v. Thompson (29 B. 654), 555
 — v. Thompson (1 Coll. 395), 232, 296, 306, 623
 — Todhunter v., 280
 — Turner v., 5
 — v. Whitelock, 193, 290
 Thomson's Estate, *In re*; Herring v. Barrow, 77, 396, 529
 — Trusts, 468
 Thomson v. Eastwood, 154
 — v. Shakespear, 98, 296, 477
 Thong v. Bedford, 348
 Thorington, Slesch v., 118, 228
 Thorley, Doe v., 76
 Thorman v. Hilhouse, 678
 Thornber v. Wilson, (3 Dr. 245), 303
 — v. Wilson (4 Dr. 350), 312
 Thornburgh, Weatherall v., 493
 Thorncroft v. Lashmar, 10
 Thorne, *In bonis*, 12
 — Dawson v.; 654
 — Mason v., 198
 — v. Phillips, 339
 Thorne-George v. Godfrey, 517
 Thorngate, Ramsay v., 409
 Thornhill, Wilkinson v., 527
 Thornley v. Thornley, 230, 335
 Thorns, Davies v., 206
 Thornton, *In bonis*, 37
 — Cooper v., 405
 — v. Ellis, 443
 — v. Hawley, 210
 — v. Howe, 296
 — v. Kempson, 316
 — Lancaster v., 365
 — Shadbolt v., 313
 — v. Thornton (20 Eq. 599), 206
 — v. Thornton (11 Ir. Ch. 474), 92
 — v. Varley, 503
 Thorold v. Thorold, 11
 Thorp, Law v., 393
 — Lea v., 251
 — v. Owen, 276, 404
 Thorpe v. Bestwick, 100
 — v. Thorpe, 277
 Throckmorton, *In re*; *Ex parte* Eyston, 508
 Thrupp v. Collett, 227, 228, 300, 308
 Thruxton v. A.-G., 649
 Thurgood, Miller v., 93
 Thurlow, Lethbridge v., 631

- Thurlow, Neighbour v., 420, 608
 Thursby v. Thursby, 445
 Thurston, *In re*; Thurston v. Evans, 201
 — v. Evans, 201
 — Hardwick v., 640
 Thwaites v. Forman, 661
 — Lambert v., 262, 263
 — v. Over, 271
 Thynne, Lady, v. Earl of Glengall, 626
 — Lord, v. Stanhope, 37
 — v. Seymour, 674
 Tibbets v. Tibbets, 401
 Tickell, Robinson v., 405
 Tickner v. Old, 377
 Tidwell v. Ariel, 641
 Tierney, Lassence v., 397
 Tiffin v. Longman, 271, 272
 Tighe v. Fetherstonhaugh, 188
 Tilbury v. Tarbut, 519
 Tilley v. Simpson, 175, 176
 Tilson v. Jones, 530
 Timewell v. Perkins, 176, 188
 Timins v. Stackhouse, 254, 547
 Tipper, Sculthorpe v., 377
 Tippet's and Newbould's Contract, *In re*, 515
 Titchfield, Marquis of, v. Horncastle, 177
 Tittle v. Wolstenholme, 78
 Tiverton Market Act, *In re*; *Ex parte* Tanner, 329, 330
 Todd v. Bielby, 660
 — Coore v., 661
 — v. Tuesbury, 579
 — v. Winchelsea, 29
 Todhunter, Hewatson v., 290
 — v. Thompson, 280
 Tokelove, Hale v., 43, 59
 Tolderny v. Colt, 524
 Tollemache v. Coventry, Earl of, 485, 592
 — v. Tollemache, 429
 Toller v. Attwood, 353, 362
 Tollner v. Marriott, 496
 Tolman v. Score, 343
 Tolson v. Collins, 630
 — v. Sheard, 380
 Tombs v. Roch, 666
 Tomkins, A.-G. v., 652
 — v. Coulthurst, 659
 — v. Tomkins, 607
 Tomkinson, Doe v., 75
 Tomkyns v. Blane, 91
 — v. Willan, 361
 Tomlin v. Underhay, 634
 Tomlinson, *In bonis*, 68
 — v. Dighton, 76
 — Knapping v., 483
 — Singleton v., 61, 63, 168, 212
 — Wall v., 575
 Tonge, *In bonis*, 32
 Tooker v. Annealey, 429
 Tookey's Trust, *Re*, 580
 Toomy, *In bonis*, 82
 Toone v. Copestake, 308
 Toosey, Bannerman v., 538
 Tootal's Estate, *In re* (2 Ch. D. 628), 119, 662
 — Trusts, *In re* (23 Ch. D. 532), 6
 Tootal, Parker v., 543, 579, 603, 621
 Toovey v. Bassett, 340, 583
 Topham, *In bonis*, 26
 — Taylor v., 503
 Toplis v. Baker, 639
 Topp, Davies v., 657
 Torin, Reynolds v., 94
 Torley, Small v., 301
 Torre, *In bonis*, 69
 — v. Browne, 155, 181, 416
 — v. Castle, 12, 54
 — Sutton v., 325
 Torrens v. Millington, 193, 194
 Torres v. Franco, 471
 Torret v. Frampton, 329
 Torrington, Lady, Douce v., 671
 Tothill v. Pitt, 391
 Tottenham v. Ely, 225
 Tourangeau, Renaud v., 504
 Tournay, Porter v., 164
 Tovey, *In bonis*, 61
 Towall, Harvey v., 393
 Tower v. Lord Rous, 678
 Townend v. Townend, 109, 110
 Townley, *In re*; Townley v. Townley, 159
 — v. Bedwell, 216, 217, 218
 — v. Bolton, 420
 — v. Townley, 159
 — v. Watson, 34
 Towns v. Wentworth, 579
 Towns' Estate, *In re*; Townsend v. Townsend, 147, 647
 Townsend v. Carus, 295
 — v. Early, 263
 — Mackintosh v., 321
 — v. Martin, 113
 — v. Townsend (34 Ch. D. 357), 147, 647
 — v. Townsend (1 L. R. Ir. 180), 161
 — v. Wilson, 368
 Townshend, Gosling v., 533, 534
 — Lord, Wilson v., 90
 — Mayer v., 397, 641
 — v. Windham, 228
 Townson v. Harrison, 433
 Towry's Settled Estate, *In re*; Dallas v. Towry, 616, 665
 Towry, Dallas v., 616, 665
 Towse, Gas Light & Coke Company, v., 380, 435
 Townsie, Rogers v., 556
 Tozer, *In bonis*, 37
 Tracy v. Glover, 337
 — v. Hereford, Lady, 438
 — Lethieullier v., 524
 Trafford v. Ashton, 232, 674

- Trafford v. Berrige, 190
 — v. Blanc, 4
 — v. Boehm, 586
 — v. Maconochie, 451, 452
 — v. Trafford, 592
 Traill, Perring v., 322
 Tranter, Smart v., 68
 Trappes v. Meredith, 509
 — Payne v., 46, 58
 — Tunstall v., 606
 Travers v. Blundell, 108
 — Miller v., 109
 — v. Travers, 651
 — Warren v., 355
 Travis v. Milne, 382
 Tredwell, *In re*; Jeffray v. Tredwell, 458
 Treeby, *In bonis*, 34
 Treffry, Meredith v., 233
 Trefusis, Drake v., 380
 Trego, Hayter v., 304, 305
 Tregonwell v. Sydenham, 478, 646
 Treharne, Baillie v., 331
 — v. Layton, 574
 Treloar v. Lean, 46
 Tremamondo, Goodenough v., 445
 Trench v. St. George, 436
 Trent v. Hanning, 357
 Trestrail v. Mason, 142
 Trethewy v. Helyar, 292, 657, 663
 Trevanion, *In bonis*, 30
 Trevor v. Trevor, 598
 Trevelyan v. Trevelyan, 12
 Trew & Perpetual Trustee Co., 596
 Tribber, Hartley v., 240
 Tribe, Green v. (9 Ch. D. 231), 43, 59
 — Green v. (27 W. R. 39; 47 L. J. Ch. 783), 146, 615, 647
 — Hart v., 404
 — v. Newland, 556
 — v. Tribe, 29
 Tricker v. Kingsbury, 500
 Trickey v. Trickey, 494, 538, 582
 Trig, Day v., 171
 Trigg, Harland v., 400
 Trimmell v. Fell, 18
 Trinder, *In bonis*, 28
 — v. Trinder, 110, 114
 Trinity College, A.-G. v., 309
 Trinity Hall, Andrew v., 88
 Trimmell, *In bonis*, 29
 Tripp, Evans v., 111
 Tristram, Barrington v., 247
 Trollope, Dubber d. Trollope v., 353
 — v. Routledge, 666
 Trott v. Buchanan, 675, 676
 Trotter, Crawford v., 328
 — v. Oswald, 583, 584
 — v. Williams, 529
 Troutbeck v. Boughey, 511
 Trower v. Butts, 259
 — v. Knightley, 371
 True, Giles v., 142
 — Harrington v., 142
 Truell v. Tysson, 369, 647
 Trufort, *In re*; Trafford v. Blanc, 4
 Truro, Lady, *In bonis*, 61
 Truscott, Carlyon v., 359, 371
 Truwhitt, Hance v., 95
 Trye v. Corporation of Gloucester, 320
 — v. Sullivan, 19, 117
 Tuck, Carden v., 171
 — Edwards v., 209, 492
 Tucker, *In re*; Bowchier v. Gordon, 256
 — *In re*; Tucker v. Tucker ([1893] 2 Ch. 323), 409, 416
 — *In re*; Tucker v. Tucker ([1894] 1 Ch. 724), 379
 — Baker v., 579
 — v. Billing, 270
 — Curnick v., 403
 — v. Good, 266
 — Hayter v., 314
 — Jones v., 196, 206
 — v. Kayeas, 645
 — Morse v., 669
 — v. Tucker ([1898], 2 Ch. 323), 409, 416
 — v. Tucker ([1894] 1 Ch. 724), 379
 Tuckerman v. Jefferies, 422
 Tuckett, Wright v., 440
 Tuckey v. Henderson, 123
 Tudor v. Tudor, 53
 Tuesbury, Doe d. Todd v., 579
 Tufnell v. Borrell, 329, 342, 551
 Tugman, Breedon v., 462
 Tugwell, *In re*, 219
 — Barnett v., 242
 — Jebb v., 444
 — Wright v., 310
 Tuite v. Birmingham, 233
 — Birmingham v., 237
 Tuke v. Gilbert, 466
 Tulk, Hart v., 620
 — v. Houlditch, 496
 Tull, Byram v., 230
 Tullett v. Armstrong, 516
 — v. Colville, 477, 480, 544
 Tunaley v. Roch, 607
 Tunno, *In re*; Raikes v. Raikes, 117, 120, 662
 Tunstall, Morley v., 657
 — v. Trappes, 606
 Tuomey, Perry v., 301
 Tupper v. Tupper, 40, 616
 Turke v. Frenchman, 579
 Turner, *In bonis*, 43
 — *Re* (2 Dr. & Sm. 501), 289, 290
 — *Re* (30 L. J. Ch. 144; 9 W. R. 174; 2 D. F. & J. 527), 357
 — *Re* (34 L. J. Ch. 660), 546
 — v. A.-G., 75
 — Berridge v., 295
 — Brooke v., 165, 488

- Turner v. Buck, 149
 — Castledon v., 224
 — v. Caulfield, 519
 — Cooke v., 497, 498
 — v. Frampton, 585
 — v. Hollard, 102, 222
 — v. Hudson, 251, 473
 — Hughes v., 107, 207
 — Jenner v., 499
 — v. King, 396
 — v. Martin, 640
 — Marwood v., 131
 — v. Moor, 529
 — v. Mullineux, 156, 157
 — Penny v., 539
 — Quennell v., 110, 676, 678
 — Sadler v., 655
 — v. Sargent, 602
 — v. Thompson, 5
 — v. Turner (21 L. J. Ch. 843),
 162, 176
 — v. Turner (30 B. 414), 372
 — v. Turner (Amb. 776; 1 B.
 C. C. 316), 410
 — West v., 507, 508
 — White v., 636
 — v. Whittaker, 253
 — Wilson v., 385, 386
 — v. Wright, 424
 — Young v., 575
 Turnour, *In bonis*, 41
 Turquand, Ricketts v., 102
 Turton, Lambarde v., 590
 Turvin v. Newcome, 479
 Tussaud's Estate, *In re*, 624, 625,
 627
 Tweedale, *In bonis*, 54
 — v. Tweedale, 501, 609
 Tweedie and Miles' Contract, *In re*,
 371
 Twigg's Estate, *In re*; Twigg v.
 Black, 648
 Twigg, Bryan v., 421
 Twining, Britton v., 392
 — v. Powell, 634
 Twist v. Herbert, 552
 Twohill, *In re*, 222
 Twopeny v. Peyton, 407
 Twyford, East v., 353
 Tyacke, Church v., 551
 Tyers, Savage v., 397
 Tylden v. Hyde, 372
 Tyles, Greville v., 33
 Tyler, *In re*; Tyler v. Tyler, 298,
 476
 — Fountaine v., 113, 116
 — v. Luke, 512
 — v. Merchant Taylors, 33
 — v. Tyler, 298, 476
 Tyley, Williams v., 45
 Tyndale v. Wilkinson, 251
 Tyndall, *Re*, 417
 — Colman v., 861
 Tynte, Ford v., 425
 Tyrer, Follett v., 511
 Tyrer, Onions v., 37, 38, 46, 616
 Tyrone, Earl of, v. Waterford, Mar
 quis of, 166, 346
 Tyrrell v. Lyford, 103
 — v. Paynton, 21
 — v. Tyrrell, 157
 Tyssen, *In re*; Knight-Bruce v.
 Butterworth, 208
 — O'Brien v., 322
 Tysson, Truell v., 369, 647
 Tytherleigh v. Harbin, 542

 UDNY v. Udny, 4, 8
 Ullee, *Re*; The Nawab Nazim of Ben-
 gal's Infants, 83, 84
 Ulrich v. Lichfield, 617
 Umbers v. Jaggard, 234, 235, 588
 Underhay, Tomlin v., 634
 Underhill v. Roden, 326, 344, 457
 Underwood v. Wing, 640
 University College, London, Yates v.,
 495
 — of London v. Yarrow, 318
 — of Oxford v. Clifton, 344
 Unsworth v. Speakman, 541, 641,
 643
 Unwin, Woodgate v., 332
 Uphill v. Marshall, 43
 Upsall, Hickman v., 416
 Upton, Briggs v., 291
 — v. Hardman, 577
 — v. Brown (12 Ch. D. 872), 285
 — v. Brown (26 Ch. D. 588), 441
 — v. Prince, 634
 — Procter v., 391
 — v. Vanner, 416
 Urquhart v. Butterfield, 5
 — v. King, 653, 655
 — v. Urquhart, 287
 Usher v. Jessep, 570
 Usticke, *Re*, 553
 — Beauchant v., 232, 345
 — v. Peters, 93
 Uthwait, Bellasis v., 626
 Uttermare, *In re*; Leeson v. Foulis,
 177
 Utterton v. Robins, 63
 Uvedall v. Uvedall, 427

 VACHELL, Breton v., 649
 — v. Roberts, 445
 Vaisey v. Reynolds, 161, 162, 166
 Valdez's Trusts, *In re*, 292, 640
 Valentine v. Fitzsimons, 287
 Vallance, *In re*, 70
 — Simmons v., 112
 — v. Vallance, 171
 Vallier, Rigden v., 10
 Vallina, Mellish v., 140
 Valpy, Lemprière v., 197
 Van v. Barnett, 210

- Van Cutsem, *In bonis*, 59
 Vandercom, Birkett v., 16
 Vanderplank v. King, 382, 477, 487, 488, 611
 Vanderstegen, Vaughan v., 36, 664
 Vane v. Lord Barnard, 425
 — Milbank v., 506
 — Duke of Newcastle v., 427
 — Earl, v. Rigden, 376
 Van Goor, Isaacson v., 606
 Van Hagen, *In re*; Sperling v. Rochfort, 201
 Vanner, Upton v., 416
 Van Straubenzee v. Monk, 61
 Vansittart, Wilson v., 328
 Varah, Wake v., 551
 Vardill, Doe v., 239
 Vardon's Trusts, *In re*, 97
 Vardy, Bull v., 609
 Varley, *Re*; Thornton v. Varley, 508
 — v. Richardson, 555, 559
 — Thornton v., 508
 — Warbrick v., 156, 498
 — v. Winn, 150, 531
 Varlo v. Faden, 441, 491
 Vassall, Knapp v., 257, 259
 Vaucher v. Solicitor to Treasury, 7, 239
 Vaudrey v. Howard, 194
 Vaudry, Cartwright v., 240
 — v. Geddes, 465
 Vaughan, *In re*; Halford v. Close, 490
 — *In re*; Vaughan v. Thomas, 298, 307, 323
 — v. Buck, 444
 — v. Burslem, 592
 — v. Headfort, Marquis of, 326
 — McKechnie v., 250
 — Mansell v., 368
 — Sandford v., 54
 — Smith v., 472
 — Thirtle v., 186
 — v. Thomas, 298, 307, 323
 — v. Vanderstegen, 36, 664
 — Viner v., 429
 — Walmsley v., 637
 Vause, Drant v., 217
 Vautier, Saunders v., 464, 507
 Vaux, Gulliver v., 506
 — v. Henderson, 280, 288
 Velho v. Leite, 80
 Venables, Lock v., 144
 — v. Morris, 361, 598
 Venes v. Marriott, 228
 Venn and Furze's Contract, *In re*, 375
 Verdon, Greenwood v., 576, 584
 Vere, Griffiths v., 491
 — v. Hill, 336, 556
 Vernon, Acherley v., 60, 451
 — Doe d. Conolly v., 103
 — v. Earl Manners, 656
 — Salkeld v., 581
 — Seymour v., 506
 Vernon, Tatham v., 194, 466
 — v. Vernon, 505
 — v. Wright, 278
 Verry, Nixon v., 509
 Verschoyle's Trusts, *In re*, 471
 Vezey v. Jamson, 306, 652
 Vicars, Booth v., 291
 Vick v. Edwards, 330
 — v. Sueter, 339
 Vickers, *In re*; Vickers v. Vickers 626, 633
 — Billingham v., 21
 — Pierson v., 350
 — v. Pound, 117, 164
 — Simpson v., 502
 — v. Vickers, 626, 633
 Vigor, A.-G. v., 180, 279
 Vile, Rackstraw v., 584
 Vincent, Cattley v., 524
 — Courtoy v., 156
 — Habbergham v., 11, 64
 — v. Lee, 367
 — Maugham v., 285
 — v. Newcombe, 444
 — Pearce v., 272
 — v. Spicer, 423
 Vine v. Raleigh, 490
 Viner v. Francis, 255
 — v. Vaughan, 429
 Vinke, Eastwood v., 630
 Vinnicomb v. Butler, 69
 Vinnicome, Burgess v., 100
 Vinyor's Case, 12
 Violet v. Brookman, 50
 Vitty, White v., 179
 Vivian v. Jegon, 362, 435
 — v. Mills, 467
 — v. Mortlock, 121
 Vizard's Trusts, 478
 Vize v. Stoney, 463, 613
 Voice, Papillon v., 598
 Von Brockdorff v. Malcolm, 205, 208, 486
 Von Buseck, *In bonis*, 3
 Von Donop, Sheffield v., 110
 Von Steiglitz, Studdert v., 336
 Vye, Jarman v., 576, 584
 W. v. B., 500
 Waddell, Ancona v., 510
 — Dowglass v., 191, 470, 487
 — v. Mundy, 573
 Waddelow, Robinson v., 275
 Wade, Birch v., 273, 395
 — Cole v., 272
 — v. Nazer, 43
 — Taylor v., 132
 — Gery v. Handley, 146, 490, 647
 Wadkin, Barrow v., 99
 Wadley v. North, 464
 Wadman, Corneck v., 556
 Wadsworth, Bortoft v., 257

- Wagstaff v. Crosbie, 525
 — v. Smith, 517
 — v. Wagstaff, 106
 Wagster, Cooke v., 159
 Wagner, Paine v., 230
 Wahlstatt, Countess de, A.-G. v.,
 4
 Wainwright, Barclay v., 441
 — Doe v., 550
 — v. Wainwright, 41
 Wainman v. Field, 194, 484
 Wainwright, Barclay v., 123, 124
 Wait, *In re*; Workman v. Petgrave,
 206
 Waite v. Combes, 159, 161
 — Hiscoe v., 493
 — v. Littlewood, 551
 — v. Morland, 189
 — v. Templer, 291
 Wake v. Varah, 551
 Wakefield v. Dyott, 559
 — v. Maffet, 564, 565, 566
 — v. Richardson, 565
 Wakeford, Wright v., 24
 Wakeham, *In bonis*, 80
 — v. Merrick, 414
 — Collier v., 211
 Walbank, Doe d. Keen v., 361
 Walcot v. Botfield, 503
 Walcott, Clogstoun v., 206
 Walden, Cooch v., 103
 Waldo v. Caley, 310
 — v. Waldo, 429
 — v. Boulter, 253, 269
 — Breslin v., 228
 Walkeley, *In bonis*, 23
 Walker, *In bonis*, 25
 — *Ex parte*, 216
 — *In re*; Church v. Tyacke,
 551
 — *Re*; Walker v. Walker,
 492
 — v. Appach, 448
 — v. Armstrong, 45
 — Bengough v., 626
 — v. Camden, Marquis of, 289,
 291
 — v. Crawahay, 508
 — v. Denne, 210, 650
 — Doe d. York v., 106, 107
 — Ellis v., 116
 — Evans v., 413, 481
 — v. Hardwick, 676
 — v. Inge, 88
 — v. Jackson, 678
 — v. Laxton, 117
 — Macdonald v., 78
 — v. Main, 563, 564, 566
 — v. Martineau, 412
 — v. Milne, 314, 315
 — v. Mower, 461, 468, 581
 — Roberts v., 99, 676
 — Robertson v., 369
 — Roe d. Walker v., 172
 — v. Shore, 256
 Walker v. Simpson, 467, 470
 — v. Smallwood, 372
 — v. Smith, 22
 — v. Southall, 364
 — v. Stuart, 160
 — Taylor v., 585
 — v. Walker (2 Curt. 854),
 55
 — v. Walker (1 Ves. Sen. 54),
 94
 — v. Walker (3 B. & P. 375),
 172
 — v. Walker, (54 L. T. 792),
 492
 — v. Walker (2 D. F. & J. 255),
 495
 — Woodhouse v., 430
 — Woodmeston v., 411, 516
 Walkey, Stebbing v., 249
 Wall, Baker v., 279, 342
 — Bishop v., 18
 — v. Bright, 186
 — v. Colshead, 212
 — Isaac v., 436
 — Thomas v., 53
 — v. Tomlinson, 575
 — v. Wall, 90
 — v. Wright, 337
 Wallace v. Anderson, 407
 — v. A.-G., 174
 — Auldjo v., 595
 — McDermott v., 422
 — v. Seymour, 615
 Walley, Mertens v., 231
 Wallich, *In bonis*, 80
 Wallinger v. Wallinger, 89
 — Walsh v., 76, 263
 Wallis, Lawrence v., 17
 — Onslow v., 650
 — v. Taylor, 390
 Wallop v. Derby, 618
 Walls v. Langlands, 175
 Wallscourt, Lord Aldridge v., 678
 Wallstead, *In re*, 451
 Walmsley v. Gerard, 588
 Walmsley v. Vaughan, 637
 Walpole v. Apthorp, 120
 — Crisp v., 52
 — v. Laslett, 457
 — Lord, v. Orford, Lord, 13, 42,
 58
 — Slade v., 116
 Walrond, Guthrie v., 88, 146, 166
 Walsh, *In re* (13 L. R. Ir. 269),
 85
 Walsh's Trust, *In re* (1 L. R. Ir.
 320), 205
 Walsh v. Blayney, 544
 — v. Browne, 243
 — Commissioners of Charitable
 Donations v., 301
 — v. Gladstone, 299
 — v. Green, 180
 — Mullally v., 187, 188
 — Nowlan v., 395

- Walsh v. Secretary of State for India, 476
 — Sinnott v., 76, 263, 275
 — v. Wallinger, 76, 263
 — v. Walsh, 122, 300, 308, 657
 Walshaw, Fielding v., 10, 11
 Walter v. Drew, 583, 603
 — v. Mackie, 207
 — v. Makin, 291
 — v. Maunde, 271
 — v. Parrott, 597, 600, 602
 Walters, Collier v., 361
 — Meinertzen v., 632
 Wandesforde v. Carrick, 588
 Want v. Stallibrass, 365
 Warbrick v. Varley, 156, 498
 Warburton, Blinston v., 337, 584
 — v. Farn, 369
 — v. Warburton, 674
 Warbutter v. Warbutter, 95
 Ward's Trusts, *In re*, 406
 Ward, Andree v., 581
 — A.-G. v., 54, 617
 — Avelyn v., 527
 — Clements v., 322
 — v. Combe, 441
 — Davey v., 385
 — v. Devon, 372
 — Greene v., 608
 — v. Grey, 168, 169, 325
 — Kenworthy v., 328, 532
 — Kinch v., 349
 — Raikes v., 398
 — Samuel v., 624
 — Spencer v., 250
 — v. Ward, 334
 — Waring v., 675
 — v. Wood, 634
 Warde, Bristow v., 489
 — Lord, Dudley, Lord, v., 431
 Wardell, Froggatt v., 326
 Wardlaw, Campbell v., 430
 Wardle v. Claxton, 513
 Wardroper v. Cutfield, 457
 Ware, *In re*; Cumberlege v. Cumberlege - Ware, 289, 473, 639
 — v. Cann, 504
 — v. Mallard, 403
 — v. Polhill, 479
 — v. Rowland, 286
 — v. Watson, 535, 538
 Waring v. Coventry, 434, 479
 — Fitzpatrick v., 379
 — v. Ward, 675
 — v. Waring, 14
 Warsley v. Foxhall, 332
 Warner, *In bonis*, 61
 — Matthews v., 54
 — v. Moir, 503
 — v. Warner, 288
 — Wheeler v., 501
 Warnoch's Estate, *In re*, 669
 Warren, *In re*; Weadon v. Reading, 378
 Warren's Trusts, *In re*, 92, 269
 Warren, Daniel v., 446
 — v. Davies, 672
 — Flint v., 214
 — Giles v., 37
 — Hall v., 14
 — v. Newton, 168
 — v. Postlethwaite, 666
 — v. Rudall (1 J. & H. 1), 88, 430
 — v. Rudall (4 K. & J. 603), 527
 — v. Traversa, 355
 — v. Warren, 624
 — Wright v., 135, 146
 Warrender v. Warrender, 5
 Warrington v. Warrington, 230
 Wartnaby, *In bonis*, 23
 Warwick, Earl of, Brooke, Lord, v. (2 De G. & S. 425), 130
 — Earl of, Brooke, Lord, v. (1 H. & T. 142), 675
 Warwicker v. Brettnall, 437
 Wass, *In re*; Marshall v. Mason, 264
 — Rawlinson v., 278
 Wasse v. Helsington, 672
 Waterford, Marquis of, Tyrone, Earl of, v., 166, 346
 Waterhouse, Bevan v., 135
 — Hall v., 17
 — v. Holmes, 317
 Waterman, Dobson v., 110
 Waters, *In re*; Waters v. Boxer, 149
 — Graves v., 612, 613
 — Lewis d. Ormond v., 336, 523, 578
 — v. Waters, 530
 — Williams v., 358
 — v. Wood, 111
 Wathen v. Smith, 631
 Watkins, *In bonis*, 61, 62, 63
 — Alpess v., 342
 — Gravenor v., 341, 419, 618
 — Harris v., 672
 — Stretch v., 462
 — v. Weston, 394, 397
 — v. Williams, 505, 519
 Watkinson, Long v., 292
 Watnough's Trusts, 317
 Watney, Slaney v., 292
 — Willis v., 172
 Watson, *In re*; Carlton v. Carlton, 3
 Watson's Trusts, *Re* (55 L. T. 316), 286
 Watson's Trust, *In re* (10 Eq. 36), 575
 Watson v. Arundel, 190
 — v. Arundell, 212
 — v. Blakeney, 323
 — v. Brickwood, 676
 — v. England, 560
 — v. Hayes, 401, 465

- Watson, Horsepool v., 290
 — Leckey v., 131
 — v. Pearson, 360
 — v. Reed, 123
 — Richardson v., (1 Nev. & M. 575), 101
 — Richardson v., (4 B. & Ad. 787), 119, 224
 — Scawin v., 397
 — Shelton v., 598
 — v. Shippard, 524
 — Sidebotham v., 116, 357
 — Southcot v., 653
 — v. Spratley, 315
 — Townley v., 34
 — Ware v., 535, 538
 — v. Watson (W. N. 1879, 95), 128
 — v. Watson (7 P. D. 10), 529
 — v. Watson (33 B. 574), 632
 — v. Young, 256, 482
 Watt v. Wood, 492
 Wattier, Davies v., 416
 Watts, *In re*; Cornford v. Elliott, 313, 314
 — Duncan v., 660
 — Eaton v., 400
 — Sellon v., 657
 — v. Watts, 216, 218
 Wauchope, Winchelsea v., 29
 Waugh v. Waugh, 545
 Wax Chandlers, A.-G. v., 308, 401, 450
 Way, House v., 445
 — Page v., 407
 Wayman, Peppercorn v., 366
 Weendon v. Reading, 378
 Weakley d. Knight v. Rugg, 575
 Weale v. Ollive, 394, 395
 Weall v. Rice, 626
 Wearing v. Wearing, 445
 Weatherall v. Thornburgh, 493
 Weatherby, Doe d. Earl Cholmondeley v., 180
 Weaver, *In re*, 385
 Webb, *In bonis*, (3 Sw. & T. 482; 10 Jur. N. S. 709), 11
 — *In bonis* (1 Jur. N. S. 1096), 29
 — *Re*; Leedham v. Patchett, 376, 416
 — Atkinson v., 630
 — v. Byng (1 K. & J. 580), 102, 106
 — v. Byng (2 K. & J. 669), 170
 — v. De Beauvoisin, 656, 665
 — Doe d. Gorges v., 610
 — v. Grace, 451
 — v. Hearing, 337, 456
 — v. Honnor, 206
 — v. Jonas, 379
 — v. Puckey, 355
 Webb v. Sadler, 390, 397, 486
 — v. Earl of Shaftesbury, 90
 — v. Webb, 490
 — v. Wools, 404
 Webber v. Corbett, 224
 — Doe d. Smith v., 574, 583, 584
 — v. Stanley, 103
 Weber, Fitch v., 214, 648
 Webster's Estate, *In re*; Widgeon v. Mello, 543
 Webster, Allen v., 244
 — v. Alsop, 658
 — A.-G. v., 296
 — v. Boddington, 483, 484
 — Fisher v., 327, 582
 — v. Hale, 113, 150
 — Herbert v., 483
 — Isaacson v., 464, 465
 — Johnson v., 674
 — Moore v., 512
 — v. Parr, 584
 — Whistler v., 91
 Wedgwood v. Denton, 131, 495
 Weeding, Machell v., 603
 — v. Weeding, 217
 Weedon, Stillman v., 200
 Weeds v. Bristow, 266
 Weeks, Garratt v., 257, 259
 — Joyner v., 430
 Weigall v. Broome, 181
 Weightman, Branston v., 244
 Welby v. Rockcliffe, 118, 676, 679
 — v. Welby, 93
 Welch, Billing v., 504
 — v. Chennell, 386
 — v. Colt, 202
 — Dalzell v., 267
 — v. Gardner, 38
 Weld v. Bradbury, 255, 280
 — Croly v., 416
 — Graves v., 431
 Weldon v. Bradshaw, 168
 — v. Hoyland, 253, 267
 Wellbeloved v. Jones, 309
 Weller v. Ker, 367
 Wellesley v. Wellesley, 425
 — Earl Cowley v., 426, 429, 440
 Wellington v. Wellington, 55, 583
 Wells, *In re*; Wells v. Wells, 154, 385, 440
 Wells' Estate, *In re*, 240
 Wells' Trusts, *In re*; Hardisty v. Wells, 91, 208, 644
 Wells v. Barwick, 660, 661
 — Cooper v., 512
 — Hardisty v., 91, 208, 644
 — Johnson v., 55
 — Knox v. (2 H. & M. 674), 230, 469
 — Knox v. (31 W. R. 559), 231
 — v. Row, 673, 677
 — v. Scott, 179

- Wells v. Wells (43 Ch. D. 281),
 154, 385, 440
 — v. Wells (20 Eq. 342), 253
 — v. Wells (18 Eq. 504), 265
 — v. Wells (2 W. R. 6 ; 17 Jur.
 1020), 615
 — v. Wilson, 55
 Wellsted, Martin v., 317
 Welply v. Cormick, 397
 Welsh, Mullally v., 175
 Wenlock, *In bonis*, 54
 Wenmoth's Estate, *In re* ; Wenmoth
 v. Wenmoth, 258, 259
 Wentworth v. Humphrey, 74
 — Towns v., 579
 West, *In bonis*, 29
 — *Ex parte*, 536, 559
 — Edwards v., 216, 217
 — Hamilton v., 351, 352, 355
 — Viscount Holmesdale v., 589,
 597
 — Horwood v., 401, 403
 — v. Lawday, 104, 657
 — v. Miller, 565
 — v. Moore, 166
 — Mortimer v. (2 Sim. 274), 54,
 488
 — Mortimer v. (3 Russ. 370),
 238
 — v. Orr, 544
 — Plenty v. (2 Phillim. 264),
 41
 — Plenty v. (6 C. B. 201 ; 16 B.
 175), 357
 — v. Lord Primate of Ireland,
 233
 — v. Ray, 77
 — r. Shuttleworth, 299 300
 — v. Turner, 507, 508
 — v. West, 463, 536
 — v. Wythes, 439, 440
 — of England and South Wales
 District Bank v. Murch, 376, 377,
 378
 Westby, Shirt v., 149
 Westcomb, Jones v., 527, 528, 654
 Westcott, Beard v., 481, 488
 — Bradley v., 196, 395
 Westerman, Olive v., 150
 Westlake, Doe d. Westlake v., 224
 Weston, *In bonis*, 37, 38
 — v. Burtenshaw 277
 — Heath v., 168
 — v. Mowlin, 184
 — Salvin v., 418
 — Watkins v., 394 397
 — Wright v., 120
 Westropp, Hare v., 420, 618
 Westwood, Hinchcliffe v. 289 290
 — v. Southey, 464, 580, 585
 Wetherall, McEnally v., 337
 — v. Wetherall, 468
 Wetherell v. Wetherell, 94
 Wetherill, Hindson v., 22
 Wey Gibson v., 17
- Whalley v. Nurton, 172
 Wharrey, Frogmorton d. Robinson
 v., 342
 Wharton v. Barker, 287, 288
 — Lord Durham v., 633
 — v. Gresham, 347
 — Surman v., 511
 Whateley v. Spooner, 635
 Whatford v. Moore, 469
 Whatley, Bricker v., 230
 Whatton, Padmore v., 46
 Wheable v. Withers, 533
 Wheate, Burgess v., 650
 — v. Hall, 370
 Wheateley v. Davies, 155
 Wheatley, *In re*, 97
 — *In re* ; Smith v. Spence, 92
 — Miller v., 498
 Wheeler, *In bonis*, 45
 — v. Adams, 288
 — v. Bingham, 500
 — v. Claydon, 670
 — Craig v., 445
 — v. Howell, 673
 — v. Warner, 501
 Wheelwright, Robinson v., 90,
 452
 Whellock, Sturton v., 39
 Whicker v. Hume, 8, 295, 321
 — v. Mitford, 249
 Whieldon, Gordon v., 230
 — McCarogher v., 625
 Whinyates, Christmas v., 33
 Whistler, *In re*, 375, 376
 — v. Webster, 91
 Whiston's Settlement, *In re* ; Lovatt
 v. Williamson, 340
 Whitaker, Henvell v., 672
 — Selby v., 460
 Whitan, Reynolds v., 220
 Whitbread, Freman v., 447
 — Macnab v., 399
 — v. St. John, 263
 — v. Smith, 433
 Whitby, Chidgey v., 152
 — Goodtitle d. Hayward v., 360,
 454
 — v. Highton, 16
 — v. Mitchell, 476
 Whitcher v. Penley, 541
 Whitchurch, A.-G. v., 318
 Whitcomb v. Whitcomb, 5
 Whitcombe, Pope v. (3 Mer. 689),
 271, 273
 — Pope v. (3 Russ. 124), 557
 White, *In bonis* (2 N. of C. 461), 30
 — *In bonis* (30 L. J. P. 55), 33
 — *In bonis* (7 P. D. 65), 159
 — *In re* (3 L. R. Ir. 413), 45
 — *In re* ; White v. White, 295,
 304
 White's Trusts (Johns. 656), 262,
 383, 539
 — Trusts, *In re* (33 Ch. D. 449),
 306

- White's Trusts, *In re* (30 W. R. 837), 320
- White, Acton v., 517
- v. Baker, 559
- Baker v., 358, 359, 360
- v. Barber, 248
- Barrett v., 159
- Bevan v., 419
- v. Birch, 108
- v. Briggs, 274, 333, 400, 601
- v. British Museum, 29
- British Museum v., 295, 312
- Bryan v., 69
- Burton v., 338
- v. Carter, 598
- v. Chitty, 510
- v. Collins, 353, 354
- v. Coram, 338
- v. Cordwell, 133
- v. Driver, 15
- Dunnage v., 175
- v. Evans, 313, 654
- Goodright v., 277
- Harcourt v., 428
- v. Herrick, 516
- v. Hill, 574
- and Hindle's Contract, *In re*, 348
- v. James, 409
- v. Lake, 156, 167
- v. M'Dermot, 502
- Moase v., 176
- *In re* Molyneux and, 375
- Pery v., 610
- v. Randolph, 42, 202
- v. Repton, 51
- Reynolds v., 53
- v. Simpson, 362
- v. Springett, 284, 287
- v. Turner, 636
- v. Vitty, 179
- v. White (22 Ch. D. 555), 91
- v. White ([1893] 2 Ch. 41), 295, 304
- v. White (7 Ves. 423), 302
- v. White (1 B. C. C. 12), 304
- v. White (4 Ves. 32; 9 Ves. 561), 436, 438
- v. White (2 Vern. 43), 676
- v. Williams, 655
- Whiteacre, *Ex parte*, 163
- Whitehead, *In re*; Peacock v. Lucas, 448
- Rhodes v., 261, 455, 521
- v. Whitehead, 144
- Whitehorn v. Harris, 271
- Whitehouse, *In re*; Whitehouse v. Edwards, 133, 635
- v. Insole, 661
- Whitelaw v. Whitelaw, 356
- Whiteley v. King, 46
- Whitelock v. Heddon, 267, 278
- Thompson v., 193, 290
- Whiteway, Brown v., 362
- v. Fisher, 617
- Whiteway, Forrest v., 329
- Whitfield, Bewick v., 427
- v. Bewit, 427
- v. Clemment, 405
- v. Langdale (1 Ch. D. 61), 102, 108
- Langdale v. (4 K. & J. 426), 160
- Rich v., 210
- Whiting v. Force, 567
- v. Wilkins, 353
- Whitley, Crook v., 265, 543
- Whitlock, Asher v., 75
- Whitman v. Aitken, 568
- Whittam, Benson v., 404
- Whittaker, *In re*; Whittaker v. Whittaker, 149
- Horton v., 524
- Turner v., 253
- v. Whittaker (21 Ch. D. 657), 149
- v. Whittaker (4 B. C. C. 30), 218
- Whittell, Allhusen v., 446, 448
- v. Dudin, 397
- Whittemore v. Whittemore, 362
- Whitten, *Re*; King v. Whitten, 483, 484
- v. Hanlon, 413
- King v., 483, 484
- Whitter v. Bremridge, 454
- Whittle, Moores v., 673
- Whitton v. Field, 555
- Whorwood, *In re*; Ogle v. Lord Sherborne, 227, 234
- A.-G. v., 321
- Whyte v. Pollok, 12
- v. Whyte, 124
- Whytehead v. Boulton, 551
- Wickett, Gulliver, v., 527
- Wickham, Heath v., 514
- v. Wickham, 423, 429
- v. Wing, 423
- Wicklow, Earl of, Lindsay v., 143, 435
- Wicks v. Scrivens, 435
- Widdrington, *In bonis*, 62
- Widgen v. Mello, 543
- Widmore v. Woodroffe, 302, 320
- Wigan v. Rowland, 100
- Wigg v. Nicholl, 668
- v. Wigg, 641, 673
- Wiggins v. Horlock, 631
- Wigginton, Hearne v., 187
- Wight, *In re*; Knowles v. Sadler, 125
- v. Hight, 575
- v. Leigh, 580
- Wightman, Pottinger v., 5
- Wightwick v. Lord, 443
- Wignall v. Park, 315
- Wilberforce, Thomas v., 461
- Wilce v. Wilce, 177
- Wilcock's Settlement, *In re*, 505
- Wild's Case, 260, 344, 346, 347

- Wild v. Reynolds, 643
 Wilday v. Barnett, 199
 — v. Sandys, 377
 Wildbore v. Gregory, 204
 Wilders' Trusts, *Re*, 595, 640
 Wilder, Blatch v., 372
 — v. Pigott, 90
 — Pigott v., 595
 Wildes v. Davies, 168, 293, 492, 494
 Wiley v. Chantepedrix, 549
 Wilkes' Estate, *In re*, 449
 Wilkes v. Collin, 160, 171
 — Symonds v., 602
 Wilkin, Wright v., 450
 Wilkins, *In re*; Spencer v. Duck-
 worth, 567
 — *In re*; Wilkins v. Rotherham,
 659, 660
 — Bland v., 646
 — v. Hogg, 389
 — v. Jodrell, 164, 415, 530
 — v. Kemeys, 572
 — v. Pryer, 42
 — v. Rotherham, 659, 660
 — Whiting v., 353
 Wilkinson, *In bonis* (6 P. D. 100),
 34
 — *In bonis* ([1892] P. 227), 81
 — *Ex parte* (3 De G. & S. 633), 417
 — *Re* (4 Ch. 587), 199
 Wilkinson's Trusts, *In re* (19 L. R.
 Ir. 531), 296, 297
 Wilkinson v. Adam, 54, 238, 241,
 242, 244, 247
 — A.-G. v., 197
 — v. Barber, 312, 320
 — Branstrom v., 464
 — v. Dent, 88, 93
 — v. Duncan (23 B. 469), 443,
 448
 — v. Duncan (30 B. 111), 483,
 486
 — v. Lindgren, 295
 — Scammell v., 16
 — v. Schneider, 200
 — v. South, 584
 — v. Thornhill, 527
 — Tyndale v., 251
 — v. Wilkinson, 293, 495
 Wilks, *In re*; Child v. Bulmer, 381
 — v. Bannister, 267, 567
 — v. Williams, 607
 Willan, Doe d. Tomkyns v., 361
 — v. Lancaster, 672
 Willard, Cole v., 631
 Willasey, Guest v., 62, 63
 Willes v. Douglas, 253
 — Douglas v., 628
 Willett, Bryden v., 268, 575
 — v. Finlay, 129
 Willetts, Adshead v., 343 525
 William d. Hughes v. Thomas, 180
 Williams, *Re*; Andrew v. Wil-
 liams, 430
 Williams, *In bonis*, 25, 26
 Williams, *Ex parte* (1 J. & W. 89), 76
 — *In re* (5 Ch. D. 735), 308
 — *Re* (16 B. 317), 565, 566
 — *In re* Esther; Foulkes v. Wil-
 liams, 204
 — *Re* Isabel; Green v. Burgess,
 656
 — *Re*; Spencer v. Brighthouse, 147
 Williams' Settlement *In re* (4 K. &
 J. 37), 386
 Williams v. Arkle, 294, 652
 — Armitage v., 251, 257, 258
 — v. Ashton, 32, 33, 283
 — A.-G. v., 318, 320
 — Biddulph v., 202
 — Bland v., 467, 468
 — v. Duke of Bolton, 427
 — Boys v., 115
 — Brickenden v., 200
 — v. Chitty, 528, 658
 — v. Clark, 462
 — v. Corbet, 86
 — Courtenay v., 133
 — Coventry v., 12
 — v. Davis, 289
 — v. Dormer, 5
 — v. Evans, 62
 — Foulkes v., 204
 — v. Gorvin, 397
 — Gyett v., 661, 673
 — v. Haythorne, 460, 461, 470
 — v. Hensman, 331
 — v. Hughes, 118, 156
 — Hugo v., 349, 488
 — v. James, 551
 — v. Jenkins, 665, 666
 — v. Jones, 654
 — v. Kershaw, 306
 — Kevern v., 257
 — Knapp v., 316
 — Laundry v., 154
 — v. Lewis, 391
 — Lloyd v., 151
 — v. Lomas, 663
 — v. Marson, 157
 — v. Mayne, 90
 — Mendham v., 564, 565
 — v. Mitchell, 198
 — v. Murrell, 147
 — v. Nelson, 160
 — v. Owen, 106
 — Owen v., 436
 — v. Phillips, 169
 — v. Pounder, 77, 396, 420
 — Prytherch v., 236
 — v. Roberts, 402, 609
 — v. Russell, 461, 471
 — Skirving v., 446
 — South v., 639
 — v. Teale, 268, 488
 — Thomas v., 37
 — Trotter v., 529
 — v. Tyley, 45
 — v. Waters, 358
 — Watkins v., 505, 519

- Williams, White v., 655
 — Wilks v., 607
 — v. Williams (20 Ch. D. 659), 78
 — v. Williams (8 Ch. D. 789), 160
 — v. Williams (1 Sim. N. S. 358), 274, 400
 — v. Williams (51 L. T. 779), 355
 — v. Williams (15 Ves. 419; 12 East, 209), 424
 — v. Wilson, 155
 Williamson, Evans v., 166
 — v. Farwell, 481, 486
 — Heardson v., 362
 — Lovatt, v., 340
 — v. Moore, 265
 — v. Naylor, 640
 Willing v. Baine, 528
 Willis v. Hiscox, 353, 504
 — v. Keymer, 402
 — v. Lucas, 339
 — v. Martin, 473
 — v. Plaskett, 160, 547
 — Radford v., 230, 569
 — v. Watney, 172
 Willmott, *In bonis*, 61, 63
 Willmott's Trusts, 566
 Willock v. Noble, 16, 18, 19
 — Noble v., 18
 — Seaward v., 488
 — Smither v., 526
 Willomier's Trusts, *In re*, 278
 Willoughby, Fowler v., 118
 — v. Middleton, 97
 — Osborne v. Holyoake, 201
 Willox v. Rhodes, 118
 Wills v. Bourne, 668
 — Fenton v., 657
 — v. Palmer, 277
 — v. Sayer, 512
 — v. Wills, 402
 Willshire, Hayden v., 268
 Willson v. Leonard, 669
 Wilmer, Sidney v., 146
 Wilmot, *Re*, 205
 — Cope v., 405, 623
 — v. Jenkins, 662
 — v. Wilmot, 550
 Wilmott v. Flewitt, 537, 560
 Wilson, *In bonis*, 29, 30, 58, 69
 — *In re*; Menteith v. Campbell, 17, 18, 19
 — *In re*; Parker v. Winder, 254
 — *Re*; Pennington v. Payne, 373, 375
 Wilson's Trusts, *In re*, 239
 Wilson v. Ann, 664
 — Ashburner v., 232
 — v. Atter, 645
 — v. Atkinson (4 D. J. & S. 455), 285
 — v. Atkinson ([1892] 3 Ch. 52), 330
 — v. Barnes, 296
 Wilson v. Bayly, 556, 571
 — v. Beddard, 24
 — v. Bell, 331
 — v. Bennett, 76
 — Bentham v., 266
 — v. Birchall, 72
 — v. Brownsmith, 112
 — v. Chestnut, 586
 — v. Coles, 215
 — Creagh v., 500
 — Creeth v., 460
 — v. Duguid, 263, 333
 — Earle v., 245
 — v. Eden, 183
 — Ferrand v., 429, 485
 — Hallifax v., 566
 — v. Heginbotham, 175, 520
 — v. Ivat, 654
 — Kehoe v., 300, 301
 — v. Knox, 465
 — v. Maddison, 151, 325, 413
 — v. Major, 399
 — v. Morley, 163
 — v. Mount, 469, 471
 — Newman v., 140
 — Nicholson v., 291
 — v. O'Leary (12 Eq. 522; 7 Ch. 448), 122, 125
 — v. O'Leary (17 Eq. 419), 659
 — Petty v., 161
 — v. Piggott, 637
 — Porcher v., 140
 — R. v., 366
 — Shore v., 101
 — Sleeman v., 83
 — Smith v., 101
 — Spencer v., 212, 464
 — v. Squire, 305
 — Thornber v. (3 Dr. 245), 303
 — Thornber v. (4 Dr. 350), 312
 — Townsend v., 368
 — v. Lord Townshend, 90
 — v. Turner, 385, 386
 — v. Vansittart, 328
 — Wells v., 55
 — Williams v., 155
 — v. Wilson, 483, 490
 Wilton's Estate, 279
 Wilton, Michell v., 417
 Wiltshire, A.-G. v., 190
 — Bentham v., 372
 — Doran v., 374, 424
 Wimbolt, Grant v., 421
 Winch v. Brutton, 399
 Winchelsea, Lord, A.-G. v., 657
 — Todd v., 29
 — v. Wauchope, 29
 Winchester, Dean and Chapter of, Wither v., 426
 Winckworth v. Winckworth, 397
 Winder, Cort v., 563
 — Parker v., 254
 Windham v. Graham, 286
 — Townshend v., 223
 Windle, Batteley v., 652

- Windross, Matthews v., 339
 — Middleton v., 89
 Windsor, Dean of, A.-G. v., 309
 Windus v. Windus, 167
 Wing v. Angrave, 526
 — Small v., 674
 — Underwood v., 640
 — Wickham v., 423
 — v. Wing, 290, 390
 Wingfield, Chalmers v., 8
 — v. Newton, 193
 — v. Wingfield, 281, 343, 540, 543
 Wingrove v. Wingrove, 22
 Winn v. Fenwick, 263, 471
 — v. Littleton, 221
 — Varley v., 150, 531
 Winnall, Rudge v., 166, 465
 Winnington, Domville v., 234, 235
 Winshup, Abrams v., 339
 Winslow, *In re*; Frere v. Winslow, 662
 Winson v. Pratt, 39, 44
 Winter, Bronsdon v., 113
 — Mackell v., 612
 — v. Perratt, 277, 278, 478
 — v. Winter, 643
 Winterton v. Crawford, 552
 — Earl of, Farrar v., 132
 Wintour v. Clifton, 93
 Wintringham, Loscombe v., 295, 304, 305
 Wirley, Hills v., 641
 Wiscot's Case, 330
 Wisden v. Wisden (5 Jur. N. S. 455), 142
 — v. Wisden (2 Sm. & G. 396), 341, 642
 Wise, Crampton v., 596
 — v. Piper, 602
 Withall, Brooman v., 139
 Witham v. Witham, 532
 Wither v. Dean and Chapter of Winchester, 426
 Withers, Allgood v., 342
 — v. Kennedy, 673
 — King v., 458
 — Wheable v., 533
 Withy v. Mangles, 281
 Witts v. Steere, 441
 Wolf v. Hill, 424
 Wolfe Murray, Dundas v., 153
 Wolferstan, Jervis v., 639
 Wollaston's Settlement, 472
 Wollaston v. King, 89, 486
 — v. Wollaston, 410
 Wolmer v. Forester, 145
 Wolstenholme, *Re*; Marshall v. Aislewood, 505
 — Fitley v., 78
 Wolverton Mortgaged Estates, *In re*, 222
 Wombwell v. Hanrott, 637
 Wood, *In re*; Anderson v. London City Mission, 128
 Wood, *In re*; Moore v. Bailey, 547
 — *In re*; Tullett v. Colville, 477, 480, 544
 — *In re*; Ward v. Wood, 634
 Wood's Estate, *In re*, 438
 — Will, *Re* Mary, 195, 657
 Wood v. Ainley, 338
 — Ashton v., 78
 — Aston v. (22 W. R. 893; 43 L. J. Ch. 715), 88, 129, 192
 — Aston v. (6 Eq. 419), 303, 398, 402
 — Barber v., 109, 657, 658
 — v. Baron, 345
 — Bird v., 285
 — Brown v., 281
 — Capel v., 436
 — Chapman v., 516
 — v. Cotton, 206, 208
 — v. Cox, 402
 — Draycott v., 422, 461
 — v. Drew, 478
 — Gaynon v., 631
 — Corporation of Gloucester v., 303, 398, 402
 — v. Goodlake, 52
 — Haydon v., 372
 — Holford v., 122, 656
 — Holland v., 255, 547
 — Hutchings v., 60
 — Jopp v. (34 B. 88; 13 W. R. 481), 4
 — Jopp v. (28 B. 53; 2 D. J. & S. 323), 564
 — L'Huille v., 53
 — v. Medley, 52
 — Meeds v., 451, 457
 — Milne v., 240
 — Oakley v., 332
 — v. Ordish, 657
 — v. Penoyre, 150
 — Robinson v., 525
 — Seaman v., 484
 — Seley v., 653
 — Solley v., 438
 — v. Thomas, 443
 — Ward v. 634
 — Waters v., 111
 — Watt v., 492
 — v. Wood (1 Phillim. 357), 53
 — v. Wood (1 P. & D. 309), 57
 — v. Wood (4 Eq. 48), 236
 — v. Wood (3 Ha. 65), 274
 — v. Wood (35 B. 587), 533
 — v. Wood (7 B. 188), 630
 — Wordsworth v., 555
 Woodall, Doe d. Woodall v., 353
 Woodburne v. Woodburne, 534, 563
 Woodcock v. Duke of Dorset, 472
 — Kearsley v., 407, 505
 — v. Renneck, 473
 Wooden v. Osbourn, 109
 Woodford, Gordon v., 424
 — Oddie v., 277

- Woodgate, *Re*, 298
 — *v. Unwin*, 332
 Woodhead, Askew *v.*, 449
 Woodhouse *v. Balfour*, 27, 69
 — Doe *v.*, 357
 — *v. Herrick*, 355
 — *v. Meredith*, 184
 — *v. Spurgeon*, 606
 — *v. Walker*, 430
 Woodhouselee, Lord, *v. Dalrymple*, 240
 Woodley, Montgomerie *v.*, 454
 Woodleys, *In re*, 88, 90
 Woodmeston *v. Walker*, 411, 516
 Woodroffe *v. Moody*, 152
 — Widmore *v.*, 302, 320
 Woodroffe *v. Woodroffe*, 531
 Woods *v. Woods*, 274
 Woodside, Millar *v.*, 111
 Woodward, *In bonis*, 46
 — *v. Glasbrook*, 573
 — *v. Goulstone*, 47
 — Mayne *v.*, 122, 125
 Woolcomb *v. Woolcomb*, 189
 Woolcott, Cripps *v.*, 554, 555
 Wooler, Brown *v.*, 458
 Woolfit, Cooper *v.*, 166
 Woollen *v. Andrews*, 488
 Woolley, Hall *v.*, 543
 — *v. Jenkins*, 370
 — *v. Norwood*, 350
 Woolmore *v. Burrows*, 274, 599, 601
 Woolrich, *In re*; Harris *v. Harris*, 545
 — *v. Woolridge*, 91
 Wools, Webb *v.*, 404
 Woolstencroft *v. Woolstencroft*, 140
 Wootton's Estate, *In re*, 449
 Wordsworth, Nicloson *v.*, 365
 — *v. Wood*, 555
 Workman *v. Petgrave*, 206
 — Ravenscroft *v.*, 668
 Worlidge *v. Churchill*, 537, 559
 Wormald, *In re*; Frank *v. Muzeen*, 508
 — Curteis *v.*, 215
 — *v. Muzeen*, 418
 Wormsley's Estate, *In re*; Hill *v. Wormsley*, 138
 Worrall, Down *v.*, 306
 — Pollock *v.*, 634
 Worsfold, Parrott *v.*, 115
 Worsley, Blachford *v.*, 150
 Worthington, *In bonis*, 35
 — *v. Evans*, 502
 — Gude *v.*, 406
 — Ingleman *v.*, 416
 Worts *v. Cubitt*, 243
 Wotton, *In bonis*, 26, 32
 — Brydges *v.*, 293
 Wraith, Minter *v.*, 287
 Wrangham's Trusts, 468
 Wray, *In bonis*, 23, 26
 Wray *v. Field*, 123
 — Gillett *v.*, 500
 Wreford, *Ex parte*, *In re Ashby*, 4C7
 — Knapman *v.*, 133
 Wren *v. Bradley*, 452
 Wrench *v. Jutting*, 190, 192
 Wrey, *In re*; Stuart *v. Wrey*, 463, 464, 465, 467
 — Henty *v.*, 459
 — *v. Smith*, 444
 — Stuart *v.*, 463, 464, 465, 467
 Wright, *In bonis*, 25
 Wright's Trusts, *In re*, 239
 Wright, Archibald *v.*, 77, 395
 — *v. Atkyns*, 273, 400
 — Bromley *v.*, 163, 596
 — *v. Callender*, 412, 416, 417
 — Gibson *v.*, 288
 — Groves *v.*, 518
 — Jesson *v.*, 348, 350, 352
 — *v. Marshall*, 589
 Wright's Trustees & Marshall, *In re*, 371
 Wright, Maynard *v.*, 620
 — *v. Netherwood*, 56
 — Olivant *v.*, 337, 533
 — *v. Pearson*, 349
 — Reynolds *v.*, 651
 — *v. Sanderson*, 27, 69
 — Shallcross *v.*, 214
 — *v. Shelton*, 178
 — *v. Stephens*, 531
 — *v. Tuckett*, 440
 — *v. Tugwell*, 310
 — Turner *v.*, 424
 — Vernon *v.*, 278
 — *v. Wakeford*, 24
 — Wall *v.*, 337
 — *v. Warren*, 135, 146
 — *v. Weston*, 120
 — *v. Wilkin*, 450
 — *v. Wright* (16 Ves. 188), 214
 — *v. Wright* (1 Ves. Sen. 409), 343
 — *v. Wright* (12 Ir. Ch. 401), 414
 — *v. Wright* (2 J. & H. 647), 516
 Wrighte, Doe d. Burdett *v.*, 324, 339
 Wrightson *v. Calvert*, 250
 — *v. Macaulay*, 277
 Wrigley *v. Sykes*, 374, 671
 Wroughton *v. Colquhoun*, 412, 416
 Wyatt, *Re*; Gowan *v. Wyatt*, 458
 — *v. Berry*, 27, 69
 — Cooper *v.*, 507
 — Evans *v.*, 143
 — Gowan *v.*, 458
 — Ingram *v.*, 21
 Wybrants, Foster *v.*, 269, 393
 Wyburn, Canterbury, Mayor of, *v.*, 321
 Wych *v. Packington*, 402

Wykeham - Martin, Cornwallis *v.*,
506, 594
Wyld *v.* Lewis, 603
Wylde's Estate, *In re*, 230
Wylie, Enohin *v.*, 3, 4, 188
Wyman *v.* Carter, 360
Wynch, *Ex parte*, 391, 393
— *v.* Wynch, 152, 465
Wyndham's Trusts, *In re*, 289, 581
Wyndham *v.* Fane, 235
— *v.* Wyndham, 256
Wynford, Lord, Falkner *v.*, 263
Wynne, Clough *v.*, 394
— *v.* Fletcher, 503
Wynter, Bullmore *v.*, 229
Wythe *v.* Henniker, 659, 667
Wythes, *In re*; West *v.* Wythes,
439, 440

YALDEN, *Re*, 505
Yapp, Gladding *v.*, 653
Yardley *v.* Holland, 131
— Paramour *v.*, 618
— *v.* Yardley, 595
Yarnold *v.* Moorhouse, 509
Yarrow *v.* Knightly, 333, 340, 341
— London, University of, *v.*, 298,
318
Yates, *In re*; Bostock *v.* D'Eyncourt,
334
Yates' Trust, *Re*, 565
Yates, Buggins *v.*, 399
— *v.* Compton, 365, 367, 410
— *v.* Maden, 413
— *v.* University College, London,
495
— *v.* Yates (6 Jur. N.S.1023), 210
— *v.* Yates (28 B. 637), 433, 443
Yeap Cheah Neo *v.* Ong Ching Neo,
275, 294, 298, 301, 406, 477, 652
Yearwood's Trusts, *In re*, 242
Yeates, Choat *v.*, 656
— *v.* Fraser, 310
Yeatherd, Patrick *v.*, 188

Yeatman, Savile *v.*, 228
Yeats *v.* Yeats, 249
Yelverton, Bubb *v.*, 293
— *v.* Yelverton, 6
Yem *v.* Edwards, 436
Yerbury's Estate, *Re*; Ker *v.* Dent,
315
Yielding, Harnett *v.*, 435
Yockney *v.* Hansard, 122
Yonge *v.* Furse, 433, 500
York, Birdsall *v.*, 252
— Sheath *v.*, 56
— *v.* Walker, 106, 107
Youle, Roberts *v.*, 569
Young's Settlement, *Re*, 507
Young, *Re*; Trye *v.* Sullivan, 19, 117
— *Re*; Young *v.* Dolman, 665
— Bannerman *v.*, 157
— Barker *v.*, 572
— Bradford *v.*, 71, 101
— Burdett *v.*, 619
— Chatteris *v.*, 126
— Cloyne, Bishop of, *v.*, 653
— *v.* Davies, 643
— *v.* Dolman, 665
— *v.* Furse, 136
— *v.* Grove, 324, 450
— Hubbard *v.*, 445
— *v.* Mackintosh, 600
— *v.* Martin, 400
— Meacher *v.*, 386
— Page *v.*, 113, 193
— *v.* Robertson, 459, 560, 561,
562
— Skottowe *v.*, 239
— *v.* Turner, 575
— Watson *v.*, 256, 482
— *v.* Young, 675
Younghusband *v.* Gisborne, 407

ZICHY FERRARIS, Countess of, *v.*
Hertford, Marquis of, 3, 63, 64
Zouch *v.* Lambert, 653

A CONCISE TREATISE ON WILLS.

CHAPTER I.

BY WHAT LOCAL LAW WILLS ARE REGULATED.

A WILL, so far as it relates to immovable property, must be made in accordance with the formalities required by the law of the land where the immovable property is situated. Chap. I.
Will of
immovables.

Immovable property for this purpose includes leaseholds; the validity and construction, therefore, of wills so far as they affect leaseholds in England, must be governed by English law. Leaseholds.
Freke v. Lord Carbery, 16 Eq. 461; *In bonis Gentili*, I. R. 9 Eq. 541; *Duncan v. Lawson*, 41 Ch. D. 394.

Wills of personalty made in execution of powers are valid, if made in accordance with the instrument creating the power without reference to the domicile of the testator, subject of course to section 10 of the Wills Act, which enacts that no appointment shall be valid unless executed in accordance with the Act. Will under
power.

Thus, a will executed according to the Wills Act is a good execution of a power, though the will would be invalid according to the law of the testator's domicile. *Tatnall v. Hankey*, 2 Moo. P. C. 342; *In bonis Alexander*, 6 Jur. N. S. 354; 29 L. J. P. 93; 1 Sw. & T. 454, n.; *In bonis Hallyburton*, 1 P. & D. 90; overruling, on this point, *Crookenden v. Fuller*, 1 Sw. & T. 441, 454.

It is doubtful whether a testamentary power to appoint
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Chap. I.

personalty can be exercised by a will valid according to the law of the testator's domicile, but not executed according to the Wills Act.

In *D'Huart v. Harkness*, 34 L. J. Ch. 311; 11 Jur. N. S. 633; 34 B. 324, it was held that such a power might be exercised by any valid will, whether executed in accordance with the Wills Act or not.

But in *In re Kirwan's Trusts*, 25 Ch. D. 373, Kay, J. was of opinion that section 10 of the Wills Act makes an appointment by will invalid, if not executed in accordance with the Act, though the will may be valid according to the law of the testator's domicile. It may, perhaps, be possible to contend that the wills rendered invalid by sect. 10 are those contemplated by sect. 9, and throughout the Act, namely, the wills of domiciled Englishmen.

By 24 & 25 Vict. c. 114 (Lord Kingsdown's Act), which extends only to testamentary instruments made by persons dying after the 6th August, 1861, it is enacted :—

Wills made out of the kingdom to be admitted to probate if made according to the law of the place where made.

1. Every will and other testamentary instrument made out of the United Kingdom by a British subject (whatever may be the domicile of such person at the time of making the same, or at the time of his or her death) shall, as regards personal estate, be held to be well executed for the purpose of being admitted in England and Ireland to probate, and in Scotland to confirmation, if the same be made according to the forms required either by the law of the place where the same was made, or by the law of the place where such person was domiciled when the same was made, or by the laws then in force in that part of Her Majesty's dominions where he had his domicile of origin. See *In bonis De la Saussaye*, 3 P. & D. 42; *In bonis Donaldson*, 3 P. & D. 45; *In bonis Lacroix*, 2 P. D. 94; *In bonis Gatti*, 27 W. R. 323.

Wills made in the kingdom to be admitted if made according to local usage.

2. Every will and other testamentary instrument made within the United Kingdom by a British subject (whatever may be the domicile of such person at the time of making the same, or at the time of his or her death), shall, as regards personal estate, be held to be well executed, and shall be admitted in England and Ireland to probate, and in Scotland

to confirmation, if the same be executed according to the forms required by the laws for the time being in force in that part of the United Kingdom where the same is made.

3. No will or other testamentary instrument shall be held to be revoked or to have become invalid, nor shall the construction thereof be altered, by reason of any subsequent change of domicile of the person making the same. Change of domicile not to invalidate will.

Leaseholds are personal estate within the Act. *In re Watson; Carlton v. Carlton*, 35 W. R. 711.

The Act applies to British subjects only, and neither this Act nor sect. 2 of the Naturalization Act, 1870 (33 Vict. c. 14), enables an alien to make a will in English form, whether his domicile at the date of the will and death is foreign or English. *In bonis Von Buseck*, 6 P. D. 211; *S. C., Bloxam v. Favre*, 8 P. D. 101; 9 *ib.* 130; *In bonis Keller*, 61 L. J. P. 39; 65 L. T. 763.

But a foreigner who has obtained letters of naturalization as a British subject is a British subject within the meaning of the Act. *In bonis Gally*, 1 P. D. 438.

It is doubtful whether the will of a British subject made in Scotland, where a will is not revoked by marriage, would be revoked by the subsequent acquisition of an English domicile and the marriage of the testator. *In bonis Reid*, 1 P. & D. 74.

The validity of wills of personal property, except in the case of British subjects dying after August, 1861, is governed by the law of the testator's domicile at the date of the death. *Anstruther v. Chalmer*, 2 Sim. 1; *Stanley v. Bernes*, 3 Hag. 373; *Price v. Dewhurst*, 8 Sim. 279; 4 M. & Cr. 76; *Preston v. Melville*, 8 Cl. & F. 1; *Craigie v. Lewin*, 3 Curt. 435; *De Zichy Ferraris v. Lord Hertford*, 3 Curt. 468; *Bremmer v. Freeman*, 10 Moo. P. C. 306; *Enohin v. Wylie*, 10 H. L. 1; see *Eames v. Hacon*, 16 Ch. D. 407. Domicile.

Legislative changes in the law of the country, where the deceased was domiciled, made after his death, though with express reference to his will, cannot be considered in deciding upon the right to have the will proved in this country. *Lynch v. Provisional Government of Paraguay*, 2 P. & D. 268.

The administration of the personal property of a deceased Domicile

Chap. I.
governs administration and construction of will.

person, whether a British subject or not, including the construction of his will, is governed by the law of his domicile at the time of his death. *Enohin v. Wylie*, 10 W. R. 467; 10 H. L. 1; see *Doglioni v. Crispin*, L. R. 1 H. L. 301; *Ewing v. Orr-Ewing*, 9 App. C. 34; 10 App. C. 453; *In re Hernando*, *Hernando v. Sawtell*, 27 Ch. D. 284; *In re Trufort*; *Trafford v. Blanc*, 36 Ch. D. 600; *Abd-ul-Messih v. Farra*, 13 App. C. 431, P. C.

In matters of procedure, such as payment of interest on legacies, the Court follows its own practice. *Hamilton v. Dallas*, 38 L. T. 215.

Domicile independent of allegiance.

The question of domicile is independent of naturalisation and allegiance. *Udny v. Udny*, L. R. 1 H. L. Sc. 441; *Haldane v. Eckford*, 8 Eq. 631; *Brunel v. Brunel*, 12 Eq. 299; *Douglas v. Douglas*, 12 Eq. 617. The following cases on this point are overruled—*Moorhouse v. Lord*, 10 H. L. 272; *In re Capdevielle*, 2 H. & C. 985; *A.-G. v. Countess de Wahlstatt*, 3 H. & C. 374; *Jopp v. Wood*, 34 B. 88; 13 W. R. 481; *Maltass v. Maltass*, 1 Rob. 67.

According to English law every person has a domicile. If a domicile of choice has not been acquired, the law attributes to him a domicile, which may be called his domicile of origin.

Meaning of domicile of origin.

It has not been decided whether domicile of origin means the domicile at birth or the last domicile imposed by the choice of the father or other person having authority to change the domicile of an infant by changing his own.

The point was raised in *In re Craignish*; *Craignish v. Hewitt*, (1892) 3 Ch. 180.

The better opinion appears to be that domicile of origin is domicile at birth; see *Udny v. Udny*, L. R. 1 H. L. Sc. 441; see, however, *Westlake's Private Int. Law*, p. 312, § 261.

Domicile of children.

The domicile of origin of a legitimate child is that of its father, of an illegitimate child that of its mother. *Dalhousie v. Macdougall*, 7 Cl. & F. 817; *Munro v. Munro*, 7 Cl. & F. 842; *Re Patten*, 6 Jur. N. S. 151.

After the death of their father the mother, so long as she remains a widow, has power to change the domicile of her infant children. They do not necessarily acquire her domicile.

Pottinger v. Wightman, 3 Mer. 67 ; see *Johnston v. Beattie*, 10 Cl. & F. 42, 66 ; *In re Beaumont*, (1893) 3 Ch. 490. Chap. I.

The power of the mother to change the domicile of her infant children apparently continues after her re-marriage. See *In re Beaumont*, *supra* ; *Lamar v. Micou*, 112 U. S. Rep. 452 ; 114 U. S. Rep. 218.

It is doubtful whether a guardian can change an infant's domicile. *Douglas v. Douglas*, 12 Eq. 617, 625 ; see *Lamar v. Micou*, *supra*.

The domicile of a person who is a lunatic when he attains his majority, and so remains up to the time of his death, changes with that of his father in the case of a legitimate child, and with that of his mother in the case of an illegitimate child, when there is no committee of the person. *Sharpe v. Crispin*, 1 P. & D. 611. Domicile of lunatic.

The domicile of a married woman at any given time is the domicile of her husband at that time. *Warrender v. Warrender*, 2 Cl. & F. 488 ; *Dalhousie v. Macdougall*, 7 Cl. & F. 817 ; *Whitcomb v. Whitcomb*, 2 Curt. 351 ; *Dolphin v. Robins*, 7 H. L. 390 ; *Bell v. Kennedy*, L. R. 1 H. L. Sc. 307 ; *Harvey v. Farnie*, 8 App. C. 43. Domicile of married woman.

The fact that the marriage is voidable makes no difference. *Turner v. Thompson*, 13 P. D. 37.

A married woman living apart from her husband under an agreement for a separation has no power to change her domicile by her own act. *Warrender v. Warrender*, 2 Cl. & F. 488. *In re Daly's Settlement*, 25 B. 456.

After a decree for a divorce the wife can select her own domicile. *Williams v. Dormer*, 2 Rob. 505.

It would seem that the same rule should apply after a judicial separation. See *Dolphin v. Robins*, 7 H. L., pp. 416, 420 ; *Le Sueur v. Le Sueur*, 1 P. D. 139 ; 2 P. D. 79.

Persons entering the military service of any State acquire the domicile of that State. *President of United States v. Drummond*, 12 W. R. 701 ; 33 B. 449. Military service.

As to the civil service, see *Urquhart v. Butterfield*, 37 Ch. D. 377.

But the domicile of a person domiciled within the United

- Chap. I** Kingdom, for instance in Jersey, is not changed by entering the military service of the Crown. *Re Patten*, 6 Jur. N. S. 151; *Brown v. Smith*, 15 B. 444; *Yelverton v. Yelverton*, 29 L. J. P. 34; 1 Sw. & T. 574; *Ex parte Cunningham*; *In re Mitchell*, 13 Q. B. D. 418; *Re Macreight*; *Paxton v. Macreight*, 30 Ch. D. 165.
- East India Company's service.** Entry into the service of the East India Company formerly effected a change of domicile. *Bruce v. Bruce*, 2 B. & P. 229, n.; 6 B. P. C. 566; *Munroe v. Douglas*, 5 Mad. 379; *Forbes v. Forbes*, Kay, 341; *Craigie v. Lewin*, 3 Curt. 435.
- Anglo-Chinese domicile.** The Court does not recognise an Anglo-Chinese domicile. *In re Tootal's Trusts*, 23 Ch. D. 532.
- The domicile of origin endures until an actual change is made by which another domicile is acquired. *Bell v. Kennedy*, L. R. 1 H. L. Sc. 307; *Ommaney v. Bingham*, cit. 5 Ves. 757; *Somerville v. Lord Somerville*, 5 Ves. 749, 786; *Moore v. Budd*, 4 Hag. 346; *Munro v. Munro*, 7 Cl. & F. 842, 876; *Countess of Dalhousie v. Macdougall*, 7 Cl. & F. 817; *A.-G. v. Dunn*, 6 M. & W. 511; *De Bonneval v. De Bonneval*, 1 Curt. 856.
- Domicile of choice.** A domicile of choice is acquired by a person who fixes his sole or principal residence in a country which is not his country of origin with the intention of residing there for a period not limited as to time. *King v. Foxwell*, 3 Ch. D. 518; *Drevon v. Drevon*, 12 W. R. 946; *The Harmony*, 2 C. Rob. Ad. 322; *Bempde v. Johnstone*, 3 Ves. 198.
- China and Turkey.** Every presumption is to be made against the acquisition by an Englishman of a domicile of choice in such countries as China and Turkey, where there is a total difference of religion, customs, and habits. *The Indian Chief*, 3 C. Rob. Ad. 22, 29; *Maltass v. Maltass*, 1 Rob. 67; *In re Tootal's Trusts*, 23 Ch. D. 532.
- Trading settlements.** Residence in a foreign state as a privileged member of an extra-territorial community destroys a domicile of choice acquired elsewhere, but does not create a new domicile; and persons residing in such communities retain or resume, as the case may be, their domicile of origin. *In re Tootal's Trusts*, 23 Ch. D. 532; *Abd-ul-Messih v. Farra*, 13 App. C. 431, P. C.

A person may by the duties of his position, or by his profession, be disqualified from acquiring a domicile of choice.

Chap. I.

Disability to acquire domicile of choice.

Thus it seems that an officer holding a commission from the Crown cannot acquire a new domicile unless he is on half-pay. *Craigie v. Lewin*, 3 Curt. 435; *Hodgson v. De Beauclerc*, 12 Moo. P. C. 285; *Cockrell v. Cockrell*, 25 L. J. Ch. 730; *Re Macreight*; *Paxton v. Macreight*, 30 Ch. D. 165; see *The Lauderdale Peerage*, 10 App. C. 692.

But there is nothing in the position of an ambassador or peer of the realm to prevent the acquisition of a domicile of choice. *Heath v. Samson*, 14 B. 441; *A.-G. v. Kent*, 1 H. & C. 12; *Hamilton v. Dallas*, 1 Ch. D. 257.

Ambassador or peer.

A domicile of choice can only be acquired by choice, therefore a compulsory residence abroad as a refugee, or to avoid creditors, will not effect a change of domicile, unless followed by voluntary adoption of the new domicile. *De Bonneval v. De Bonneval*, 1 Curt. 864; *Pitt v. Pitt*, 12 W. R. 1089; *In re Duleep Singh*; *Ex parte Cross*, 7 Morrell, 228.

Compulsory residence.

Similarly residence abroad in the performance of a public duty, such as that of judge, military officer, or consul, does not in itself confer a foreign domicile. *A.-G. v. Rowe*, 1 H. & C. 81; *A.-G. v. Napier*, 6 Ex. 217; *Sharpe v. Crispin*, 1 P. & D. 611.

A person compelled to go abroad for the sake of his health would probably not acquire a foreign domicile. See *Johnston v. Beattie*, 10 Cl. & F. 42, p. 138.

Residence for sake of health.

But where a foreign country is selected as a residence in the hope or opinion that it may be better suited to the health or constitution, a domicile of choice may be acquired. *Hoskins v. Matthews*, 8 D. M. & G. 13.

Domicile of choice is a mixed question of intention and act; there must be an intention to reside permanently in a particular country, followed by actual residence. Where the intention is clear, length of residence would be immaterial.

Domicile of choice constituted by completed intention.

Where there is no direct evidence of intention, length of residence is material as showing what the intention was. See *In re Grove*; *Vaucher v. The Solicitor to the Treasury*, 40 Ch. D. 216.

Chap. I.

Thus a fixed intention to adopt a certain place as a domicile, followed by arrival at that place, would, it seems, at once constitute that place a domicile. *Bell v. Kennedy*, L. R. 1 H. L. Sc. 307.

*Querens quo
se conferat.*

The fact of residence in a particular place will not constitute that place a domicile of choice so long as the person residing is in search of some permanent place of residence, and has not made up his mind where it shall be. *Bell v. Kennedy*, L. R. 1 H. L. Sc. 307; *Whicker v. Hume*, 7 H. L. 124; *Re Patience*; *Patience v. Main*, 29 Ch. D. 976; see *In re Craignish*, *Craignish v. Hewitt*, (1892) 3 Ch. 180.

Permanent
residence.

By permanent residence must be understood residence to which no definite limit of time can be assigned.

Thus residence abroad with a view to making a fortune will effect a change of domicile. *Lyall v. Paton*, 25 L. J. Ch. 746; *Allardice v. Onslow*, 33 L. J. Ch. 434; see *Goulder v. Goulder*, (1892) P. 240.

So an intention to reside in a country as long as another person lives is in effect an intention to reside permanently. *Anderson v. Laneville*, 9 Moo. P. C. 325.

Intention to
return.

Where a person has in fact taken up a permanent residence in a country, that country will be his domicile notwithstanding an intention to retain his domicile of origin, or some other domicile. *A.-G. v. Kent*, 1 H. & C. 12; *A.-G. v. Fitzgerald*, 3 Dr. 610; *In re Steer*, 3 H. & N. 594; *Doucet v. Geoghegan*, 26 W. R. 825; 9 Ch. D. 441. See, too, *Stanley v. Bernes*, 3 Hag. 373; *Anderson v. Laneville*, 9 Moo. P. C. 325; *In bonis Raffenel*, 3 Sw. & T. 49; *Stevenson v. Masson*, 17 Eq. 78.

Two
residences.

Where a person has two residences, the place where he usually resides with his wife and family will be considered his place of domicile. *Forbes v. Forbes*, Kay, 341; *Aitchison v. Dixon*, 10 Eq. 589; *Platt v. A.-G. of New South Wales*, 3 App. C. 336; *D'Etchegoyen v. D'Etchegoyen*, 13 P. D. 132.

Revival of
domicile of
origin.

Where a domicile of choice is abandoned, the domicile of origin is revived until a fresh domicile of choice is acquired. *The Indian Chief*, 3 C. Rob. Ad. 12; *In bonis Bianchi*, 3 Sw. & T. 16; *Udny v. Udny*, L. R. 1 H. L. Sc. 441; *King v. Foxwell*, 3 Ch. D. 518; *In re Marrett*; *Chalmers v. Wingfield*,

36 Ch. D. 400 ; overruling *Munroe v. Douglas*, 5 Mad. 379, 405, so far as inconsistent. Chap. I.

As to what the domicile of origin is which revives, see *ante*, p. 4.

By 24 & 25 Vict. c. 121, where a convention has been entered into with a foreign state willing to adopt the provisions of the Act, an order in Council may direct that no British subject resident in such state shall acquire a domicile there unless he shall have been resident there for a year, and shall have made a declaration of his intention to become domiciled there ; and the subjects of the foreign state are to acquire a British domicile only after the same formalities have been gone through.

CHAPTER II.

GENERAL CHARACTERISTICS OF TESTAMENTARY
INSTRUMENTS.

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|---|--|
| <p>Chap. II.</p> <p>Testamentary gift.</p> | <p>A GIFT intended to be testamentary can only be effectually made by an instrument duly executed as a will. Thus, a direction to give property to a person after the donor's death, where the donor retains full control of the property during his life, is invalid. <i>Powell v. Hellicar</i>, 26 B. 261; <i>Fletcher v. Fletcher</i>, 4 Ha. 79; <i>Hughes v. Stubbs</i>, 1 Ha. 481; <i>Maguire v. Dodd</i>, 9 Ir. Ch. 452; <i>Farquharson v. Cave</i>, 2 Coll. 356; <i>Gough v. Findon</i>, 7 Ex. 48.</p> |
| <p>Deed to take effect after death.</p> | <p>In the same way a deed not intended to have any effect till the settlor's death is testamentary. <i>Conssett v. Bell</i>, 1 Y. & C. C. 569; <i>Rigden v. Vallier</i>, 2 Ves. Sen. 253; <i>Dillon v. Coppin</i>, 4 M. & Cr. 647; <i>In bonis Morgan</i>, 1 P. & D. 214; <i>Fielding v. Walshaw</i>, 27 W. R. 492; <i>In re Robson</i>; <i>Emley v. Davidson</i>, 30 W. R. 257; <i>Milnes v. Foden</i>, 15 P. D. 105.</p> |
| <p>Voluntary settlement.</p> | <p>A voluntary settlement, though reserving to the settlor a life interest and containing a power of revocation, is not testamentary. <i>Thompson v. Browne</i>, 3 M. & K. 32. The case of <i>A.-G. v. Jones</i>, 3 Pr. 368, is overruled; see <i>Marjoribanks v. Hovenden</i>, Dru. 11, 27, 29; <i>Sheldon v. Sheldon</i>, 1 Rob. 83; <i>Brown v. Adv.-G.</i>, 1 Macq. 79; see, too, <i>Hope v. Harman</i>, 11 Jur. 1097; <i>Hope v. Hope</i>, 10 B. 581.</p> <p>Similarly, an instrument coming into operation immediately, and of which no part is revocable, more especially if it involves anything in the nature of consideration, cannot take effect as a will. <i>In bonis Robinson</i>, 1 P. & D. 384; see <i>In bonis Halpin</i>, 1 I. R. 8 Eq. 567; <i>Thorncroft v. Lashmar</i>, 10 W. R. 783.</p> |

On the other hand, if a deed is in part clearly testamentary, Chap. II.
 such part may take effect as a will, though other parts are not Deed in part
testamentary.
 testamentary. *Doe d. Cross v. Cross*, 8 Q. B. 714; see *Peacocke v. Monk*, 1 Ves. 127; *Belt*, 82; *Hogg v. Lashley*, 3 Hag. 415, note; *Bagnall v. Downing*, 2 Lee, 3.

Any instrument executed in the manner required by the What may
take effect as
a will.
 Wills Act may take effect as a will, provided the intention was
 that it should not operate till after the death of the donor.

Thus, the following instruments, being properly executed, have been allowed to take effect as testamentary dispositions:—

Orders on a savings bank, and on a banker. *In bonis Marsden*, 1 Sw. & T. 542; *Jones v. Nicolay*, 2 Rob. 288.

A cheque to take effect after death. *Bartholomew v. Henley*, 3 Phillim. 317.

A letter. *Denny v. Barton*, 2 Phillim. 575; *In bonis Mundy*, 2 Sw. & T. 119; 9 W. R. 171.

A paper containing wishes and a dying request. *In bonis Lowry*, 5 N. of C. 619; *In bonis Mundy*, 2 Sw. & T. 119.

A deed of gift to take effect at death. *Habergham v. Vincent*, 2 Ves. J. 204; 4 B. C. C. 355; *Thorold v. Thorold*, 1 Phillim. 1; *Shergold v. Shergold*, cit. *ib.* 10; *In bonis Montgomery*, 5 N. of C. 99; *In bonis Morgan*, 1 P. & D. 214; *Fielding v. Walshaw*, 27 W. R. 492.

An instrument to take effect two years “after my wife’s death if she survives me.” *In bonis Newns*, 7 Jur. N. S. 688.

Where there is nothing to show that an instrument has reference to the death of the person executing it, it cannot have effect as a will. *Glynn v. Oglander*, 2 Hag. 428; *King’s Proctor v. Daines*, 3 Hag. 218; *Shingler v. Pemberton*, 4 Hag. 359; *Marjoribanks v. Hovenden*, Dru. 11.

But evidence is admissible to show that a deed or other Evidence of
testamentary
intention.
 instrument of gift, which on the face of it is not testamentary,
 was not intended to operate till the death of the person
 executing it. *Cock v. Cooke*, 1 P. & D. 241; *Robertson v. Smith*, 2 P. & D. 43; *In bonis Coles*, 2 P. & D. 362; *In bonis Webb*, 3 Sw. & T. 482; 10 Jur. N. S. 709; *In bonis English*, 3 Sw. & T. 586; *In bonis Slinn*, 15 P. D. 156.

And, conversely, evidence is admissible to show that an

Chap. II.	instrument on the face of it testamentary was not intended to be a will. <i>Nicholls v. Nicholls</i> , 2 Phillim. 183; <i>Lister v. Smith</i> , 3 Sw. & T. 282; <i>Trevelyan v. Trevelyan</i> , 1 Phillim. 149; <i>In bonis Nosworthy</i> , 11 Jur. N. S. 570.
Intention to make will.	An instrument, expressing merely an intention of instructing a solicitor to prepare a testamentary instrument with a view to make a particular legacy, will not take effect as a testamentary instrument, where there is no extraneous evidence of testamentary intention. <i>Coventry v. Williams</i> , 3 Curt. 787.
Instructions for will.	A duly executed instrument described as instructions for a will may have effect as a will if it appears that it was intended to take effect in the absence of a more formal instrument. <i>Bone v. Spear</i> , 1 Phillim. 345; <i>Torre v. Castle</i> , 1 Curt. 303; 2 Moore P. C. 133; <i>Barwick v. Mullings</i> , 2 Hag. 225; <i>Hattatt v. Hattatt</i> , 4 Hag. 211; <i>Whyte v. Pollok</i> , 7 App. C. 400; see <i>Ferguson-Davie v. Ferguson-Davie</i> , 15 P. D. 109.
Will under power.	Since the Wills Act, sect. 10, an appointment by will insufficiently executed cannot be aided. <i>In re Kirwan's Trusts</i> , 25 Ch. D. 373.
Contingent will.	A will may be made contingent upon the happening of an event, so that if the event does not happen the will has no effect. <i>Roberts v. Roberts</i> , 2 Sw. & T. 337; 31 L. J. P. 46.
	Thus, if the testator makes his will conditional upon his death during a particular period which he survives, the will does not take effect. <i>In bonis Porter</i> , 2 P. & D. 22; <i>In bonis Robinson</i> , 2 P. & D. 171; <i>In bonis Lindsay</i> , 2 P. & D. 459. See <i>In bonis Thorne</i> , 4 Sw. & T. 36; 34 L. J. P. 131.
	On the other hand, if the possibility of death during a particular period is given as the reason or motive why the testator makes his will, it is not contingent upon the happening of the death during that period. <i>In bonis Dobson</i> , 1 P. & D. 88; <i>In bonis Martin</i> , 1 P. & D. 380; <i>In bonis Mayd</i> , 6 P. D. 17; <i>In bonis Stuart</i> , 21 L. R. Ir. 105.
	A testator may give to a third person the option of deciding whether a testamentary instrument executed by him shall take effect as a will or not. <i>In bonis Smith</i> , 1 P. & D. 717.
Will revocable.	A will is in all cases revocable, even though the testator may declare it to be irrevocable. <i>Vinyor's Case</i> , 8 Rep. 82a.

A covenant not to revoke a will, or a covenant to execute a testamentary power of appointment, is a binding covenant, for breach of which an action will lie, though it cannot be specifically enforced. *Robinson v. Ommannney*, 23 Ch. D. 285; *In re Parkin*; *Hill v. Schwarz*, (1892) 3 Ch. 510.

Chap. II.
Covenant not to revoke.

Persons may make joint wills, which are, however, revocable at any time by either of them or by the survivor. *Hobson v. Blackburn*, 1 Add. 274; *In bonis Stracey*, Dea. & S. 6; *In bonis Lovegrove*, 2 Sw. & T. 453; *In bonis Fletcher*, 11 L. R. Ir. 359.

Joint wills.

A joint will may be made to take effect after the death of both testators; and if the joint will is not a disposition by each testator of his own property, but a disposition of joint property after the death of the survivor, the will cannot be proved till the death of the survivor. *In bonis Raine*, 1 Sw. & T. 144.

In ordinary cases a joint will is looked upon as the will of each testator, and may be proved on the death of one. *In bonis Stracey*, 1 Jur. N. S. 1197; Dea. & S. 6; *In bonis Miskelly*, I. R. 4 Eq. 62, where *In bonis Raine* is disapproved.

It seems that two persons may agree to make mutual wills, which remain revocable during the joint lives by either with notice to the other, but become irrevocable after the death of one of them if the survivor takes advantage of the provisions made by the other. *Dufour v. Pereira*, 1 Dick. 419; 2 Harg. Jur. Arg. 272; 2 Harg. Jur. Ex. 101; see 3 Ves. 416; *Lord Walpole v. Lord Orford*, 3 Ves. 401; *Denyssen v. Mostert*, L. R. 4 P. C. 236; *Dias v. De Livera*, 5 App. C. 123, P. C.

Mutual wills.

For the effect of a promise to leave a person property by will, see *Maddison v. Alderson*, 8 App. C. 467; *Humphreys v. Green*, 10 Q. B. D. 148.

Promise to make a will.

CHAPTER III.

TESTAMENTARY CAPACITY.

Chap. III.**General
capacity.**

A TESTATOR must, at the time of making his will, have an understanding of the nature of the business in which he is engaged, a recollection of the property he means to dispose of, of the persons who have a claim to be the objects of his bounty, and the manner in which it is to be distributed. *Harwood v. Baker*, 3 Moo. P. C. 282; *Longford v. Purdon*, 1 L. R. Ir. 75.

The question of sanity is a question of fact, and there is no presumption that a testator is sane till the contrary is shown. *Sutton v. Sadler*, 5 W. R. 880; 3 C. B. N. S. 87; *Symes v. Green*, 1 Sw. & T. 401; *Cleare v. Cleare*, 1 P. & D. 655.

Delusions.

Where a testator is subject to delusions with regard to persons who would be the natural objects of his testamentary bounty, his will made while he is under the influence of such delusions is invalid. *Dew v. Clark*, 3 Add. 79; 5 Russ. 163; *Waring v. Waring*, 6 Moo. P. C. 341; *Smith v. Tebbitt*, 1 P. & D. 398; *Boughton v. Knight*, 3 P. & D. 64.

Where a testator is subject to delusions, which leave the general power of understanding unaffected and are wholly unconnected with his testamentary dispositions, such delusions do not affect his capacity to make a will. *Banks v. Goodfellow*, L. R. 5 Q. B. 549; *Smee v. Smee*, 5 P. D. 84; see *Jenkins v. Morris*, 14 Ch. D. 674; *Murfett v. Smith*, 12 P. D. 116.

A will made by a testator after he has been insane must be shown to have been made after his recovery or in a lucid interval. *Groom v. Thomas*, 2 Hagg. 433; *A.-G. v. Parnter*, 3 B. C. C. 443; *Hall v. Warren*, 9 Ves. 611; *Waring v. Waring*, 6 Moo. P. C. 341.

Upon the question whether a will was made during a lucid interval, the rational character of the will, where it is prepared by the testator without assistance, is evidence to show that it was made in a lucid interval. *Cartwright v. Cartwright*, 1 Phillim. 90, 100; *White v. Driver*, 1 Phillim. 88; *Brogden v. Brown*, 2 Add. 445; *Ayrey v. Hill*, 2 Add. 210.

Chap. III.

Lucid interval.

Every person of sound mind and not under some special disability may make a will.

A will made by a person under twenty-one (unless he is a soldier in actual military service, or a mariner or seaman at sea), is invalid. 1 Vict. c. 26, s. 7; Sugd. R. P. Stat. 330.

Under the Married Women's Property Act, 1882 (45 & 46 Vict. c. 75), sect. 1 (1), a married woman may dispose by will, of any real or personal property as her separate property, as if she were a *feme sole*.

Married Women's Property Act, 1882.

And sect. 3 of the Married Women's Property Act, 1893 (56 & 57 Vict. c. 63), enacts that "section 24 of the Wills Act, 1837, shall apply to the will of a married woman made during coverture whether she is or is not possessed of or entitled to any separate property at the time of making it, and such will shall not require to be re-executed or republished after the death of her husband."

Married Women's Property Act, 1893.

The Act was passed on the 5th December, 1893. No time is fixed for its commencement; it therefore takes effect from the date of the passing of the Act. Sect. 3 is not in terms limited to the wills of married women who die after the passing of the Act; but no doubt it must be so limited. It is probably not to be limited to wills made after the passing of the Act.

As regards a woman married before the 1st January, 1883, sect. 5 of the Act of 1882, makes any property her title to which accrues after that date her separate estate, and therefore disposable by will. If the title whether vested or contingent or in reversion accrues before that date, the Act does not apply. *Reid v. Reid*, 31 Ch. D. 402.

Effect of Married Women's Property Act, 1882.

Where property comes to a married woman under a bequest to next of kin to be ascertained at a certain time, her title

Chap. III.

accrues at that time, and not at the testator's death. *In re Parsons*; *Stockley v. Parsons*, 45 Ch. D. 51.

The Act of 1882 did not enlarge the testamentary capacity of married women, except in so far as it converted certain property into separate estate, which was not separate estate before the Act.

Thus a woman married before the Act, could not by a will made during the coverture dispose of property, her title to which accrued before the Act, and the Act did not enable a married woman by a will made during the coverture to dispose of property accruing to her after the coverture. *In re Cuno*; *Mansfield v. Mansfield*, 43 Ch. D. 12; *In re Price*; *Stafford v. Stafford*, 28 Ch. D. 709; *In re Taylor*; *Whitby v. Highton*, 57 L. J. Ch. 430; 58 L. T. 842; 36 W. R. 683.

This is now altered by the Act of 1893; see *supra*.

Funeral
expenses of
married
woman.

Having regard to the alteration of the law as regards married women, her funeral expenses will probably in future be payable out of her estate, and not by her husband in exoneration of her estate. *In re M'Myn*; *Lightbown v. M'Myn*, 33 Ch. D. 575.

Powers of
married
women before
the Act.

Before the Married Women's Property Act, 1882, a married woman had no power to make a will except in the following cases:—

1. Might
continue
representation
to an estate.

A married woman, who was an executrix, could make a will and appoint an executor for the purpose of continuing the representation to the original testator. *Scammell v. Wilkinson*, 2 East, 552; *Birkett v. Vandercom*, 3 Hagg. 750; *In bonis Richards*, 1 P. & D. 156.

2. Will under
power.

A married woman might by a will made in exercise of a power dispose of the legal estate and the equitable interest in lands and of personal estate. *Driver v. Thompson*, 4 Taunt. 294; *Willock v. Noble*, L. R. 7 H. L. 580; *In re Anstis*; *Chetwynd v. Morgan*; *Morgan v. Chetwynd*, 31 Ch. D. 596.

A power of making a testamentary appointment given to a woman by a settlement made on her first marriage, might be exercised during that or any subsequent marriage. *Burnett v. Mann*, 1 Ves. Sen. 156; *Hawksley v. Barrow*, 1 P. & D. 147.

In the case of realty, where a married woman having appointed by will under a power survived her husband and took a conveyance to herself, the conveyance has been held to execute the power and to revoke the will. *Laurence v. Wallis*, 2 B. C. C. 319. Chap. III.
Whether
power
destroyed by
conveyance.

In the case of personalty, however, it has been held that where a married woman having made a will under a power survived her husband and took an assignment of the fund over which the power extended from the trustees, the will was nevertheless valid. *Dingwell v. Askew*, 1 Cox. 427; *Clough v. Clough*, 3 M. & K. 296. These cases are probably open to reconsideration.

A married woman could dispose by will of personal estate and of the beneficial interest in real estate when settled to her separate use. *Taylor v. Meads*, 10 Jur. N. S. 166; 34 L. J. Ch. 203; 4 D. J. & S. 597; *Pride v. Bubb*, 7 Ch. 64; *Hall v. Waterhouse*, 10 Jur. N. S. 361; 5 Giff. 64; see *Dye v. Dye*, 13 Q. B. D. 147. 3. Will of
separate
estate.

A restraint upon anticipation affecting *corpus* does not prevent a disposition by will. *Re Currey*; *Gibson v. Wey*, 56 L. T. 80.

Though the married woman had no separate estate at the date of the will, the will took effect as regards after-acquired separate estate. *Charlemont v. Spencer*, 11 L. R. Ir. 347, 490. After-acquired
separate
estate.

Property which becomes the separate estate of a married woman under the Married Women's Property Act, is for this purpose on the same footing as her other separate estate. *In re Bowen*; *James v. James*, (1892) 2 Ch. 291.

The legal estate not being affected by the separate use could not be disposed of by will.

The accumulations of property belonging to a married woman for her separate use, made during coverture whether by herself or a trustee for her, are separate estate. *Mayd v. Field*, 3 Ch. D. 587; *In re Wilson*; *Menteith v. Campbell*, 26 W. R. 848; *In bonis Tharp*, 3 P. D. 76. Savings.

In two Irish cases it has been held, that property given to a married woman for her separate use on the event of the insolvency of her husband, could not be disposed of before the Separate use
to arise on
contingency.

Chap. III.

husband became insolvent. *Mara v. Manning*, 8 Ir. Eq. 218; *Bestall v. Bunbury*, 13 Ir. Ch. 318. These cases were, however, cases of contract and not of wills. See too, *Flower v. Buller*, 15 Ch. D. 665; *Pike v. FitzGibbon*, 17 Ch. D. 454.

Where a married woman had a power to appoint if she should not survive her husband, and an absolute interest to her separate use if she survived him, a will made during coverture, expressed to be in virtue of the power and of every other power enabling her, took effect upon the separate estate if she survived her husband. *Bishop v. Wall*, 3 Ch. D. 194.

4. Will *ex assensu viri*.

A married woman might, with her husband's assent, dispose by will of personal property not settled to her separate use and over which she had no power of appointment. *Willock v. Noble*, L. R. 8 Ch. 778; 7 H. L. 580.

It was necessary that the assent of the husband should be given to the particular will with knowledge of its contents.

It was said in *Noble v. Willock*, 8 Ch. p. 790, that the husband might withdraw his assent until he had either assented to probate or had acted upon the will.

But an assent to the probate of the will once given after the wife's death cannot be withdrawn. *Maas v. Sheffield*, 1 Rob. 364; *In bonis Cooper*, 6 P. D. 34; *Chappell v. Charlton*, 56 L. J. P. 73; 57 L. T. 496.

Assent re-
voked by
death.

The will of a married woman, in so far as it requires her husband's assent, becomes invalid by his death in her lifetime, whether he has assented to it or not. *Price v. Parker*, 15 Sim. 198; *Trimmell v. Fell*, 19 B. 537; *Willock v. Noble*, L. R. 7 H. L. 580; *In re Wilson*; *Menteith v. Campbell*, 26 W. R. 848.

5. Wife of
exile and felon.

The wife of a person banished for life by Act of Parliament (a), or attainted (b), and the wife of an alien enemy (c), and of a convict transported for life, though he has received a conditional pardon (d), is for testamentary purposes a *feme sole* as regards property vested in her after her husband's disability has been incurred. *Countess of Portland v. Prodgers*, 2 Vern. 104 (a); *Newsome v. Bowyer*, 3 P. W. 37 (b); *Deerly v. Mazarine*, 1 Salk. 116 (c); *Re Martin*, 2 Rob. 405; 15 Jur. 686; *In bonis Coward*, 11 Jur. N. S. 569; 24 L. J. P. 120 (d).

The wife of a convict transported for years would seem to be

in the same position notwithstanding *Coombs v. Queen's Proctor*, 2 Rob. 547, which was not decided on the ground that the sentence was only for years and is inconsistent with *Re Harrington's Trusts*, 29 B. 24; *Atlee v. Hook*, 23 L. J. Ch. 776.

Chap. III.

A married woman who had obtained a protection order could make a will as if she were a *feme sole*, and the order related back to the date of the desertion. *In bonis Elliott*, 2 P. & D. 274.

6. Protection order.

But the husband might oppose grant of probate on the ground that the protection order was obtained by fraud. *Mudge v. Adams*, 6 P. D. 54; *Mahoney v. McCarthy*, (1892) P. 21.

In cases not within the Married Women's Property Act, 1893, the will of a married woman made during coverture is ineffectual to pass property coming to her after the coverture and not given to her separate use.

Limit of testamentary power of married woman.

Thus such a will does not pass property coming to her under her husband's will, or property settled upon her absolutely if she survives her husband, or the dividends received after the husband's death upon stock settled upon her for life for her separate use, or stock standing in the joint names of husband and wife and coming to the wife by survivorship. *Willock v. Noble*, L. R. 7 H. L. 581; *In re Cuno*; *Mansfield v. Mansfield*, 43 Ch. D. 12; *Mayd v. Field*, 3 Ch. D. 587; *In re Wilson*; *Menteith v. Campbell*, 26 L. R. 848; *In bonis Tharp*, 3 P. D. 76; *In re Young*; *Trye v. Sullivan*, 28 Ch. D. 705.

As already stated, the Married Women's Property Act, 1882, did not alter the law in this respect. But the Act of 1893 has now done so.

By the Naturalization Act, 1870 (33 Vict. c. 14), which is not retrospective, real and personal property may be taken, acquired, held, and disposed of by an alien in the same manner in all respects as by a natural born British subject. See *Sharp v. St. Sauveur*, 7 Ch. 343; *De Geer v. Stone*, 22 Ch. C. 243.

Aliens.

There appears never to have been any testamentary incapacity as such, affecting traitors, felons or suicides. They were not incapable of making wills, they were only incapable of disposing of such property as was forfeited for their offence.

Traitors, felons, and suicides.

Chap. III.

Thus a *felo de se* could make a will of realty which was not forfeited, and could also appoint an executor by will. *Norris v. Chambres*, 7 Jur. N. S. 59; *In bonis Bailey*, 2 Sw. & T. 156.

Forfeiture
abolished.

By 33 & 34 Vict. c. 23 forfeiture and escheat for treason and felony is abolished, and sect. 8 enacts that every convict shall be incapable during the time while he shall be subject to the operation of the Act of alienating or charging any property, or of making any contract. See *Ex parte Graves*; *In re Harris*, 19 Ch. D. 1.

Sects. 9—17 contain provisions for the administration of the convict's property by administrators, and sect. 18 provides that the property shall be invested and accumulated for the benefit of the convict and his heirs and legal personal representatives, and shall revert in the convict upon his ceasing to be subject to the operation of the Act, or his heirs or legal personal representatives.

The Act appears to leave the testamentary power of a convict untouched, and it would seem therefore that a convict may now dispose of his property by will.

Outlawry.

By 42 & 43 Vict. c. 59, s. 3, outlawry in any civil proceeding is abolished.

CHAPTER IV.

REQUISITES FOR A VALID WILL.

No will can be valid of which the testator does not know and approve the contents. *Barry v. Butlin*, 2 Moo. P. C. 480; *In bonis Duane*, 8 Jur. N. S. 752; 31 L. J. P. 173; *Sutton v. Sadler*, 3 C. B. N. S. 87; 26 L. J. C. P. 284; *Hastilow v. Stobie*, 1 P. & D. 64; *Cleare v. Cleare*, *ib.* 655; *In bonis Hunt*, 23 W. R. 553; 3 P. & D. 250; overruling *Cunliffe v. Cross*, 3 Sw. & T. 37; 32 L. J. P. 68.

Chap. IV.

Knowledge of contents.

A testator cannot, therefore, delegate his testamentary power to another person; that is to say, he cannot adopt and execute a will made for him without knowing its contents. *Hastilow v. Stobie*, 1 P. & D. 64; *Cleare v. Cleare*, *ib.* 655. See *ante*, p. 12.

Delegation of testamentary power.

But a will prepared in accordance with the testator's instructions is valid, though at the time of execution the testator remembers only that he has given instructions and believes the will to be in accordance with them. *Parker v. Felgate*, 8 P. D. 171.

Whenever a will is prepared under circumstances which raise a well-grounded suspicion that it does not express the mind of the testator, it is for those who propound the will to remove such suspicion. *Barry v. Butlin*, 2 Moo. P. C. 480; *Fulton v. Andrew*, L. R. 7 H. L. 448; *Brown v. Fisher*, 63 L. T. 465; *Tyrell v. Paynton*, (1894) P. 151.

Legatee preparing will must prove knowledge.

The fact that the will is prepared by or on the instructions of the person taking a benefit under it is a circumstance raising such suspicion. *Paske v. Ollatt*, 2 Phillim. 323; *Ingram v. Wyatt*, 1 Hagg. 388; *Billinghurst v. Vickers*, 1 Phillim. 187;

Chap. IV.

Baker v. Batt, 2 Moo. P. C. 317; *Scoular v. Plowright*, 5 W. R. 99; 10 Moo. P. C. 440; *Fulton v. Andrew*, L. R. 7 H. L. 448; *Hegarty v. King*, 5 L. R. Ir. 249; 7 *ib.* 18; *Parker v. Duncan* 62 L. T. 642. See *Donnelly v. Broughton* (1891) A. C. 435 P. C.

Fiduciary
relation.

But the influence of a person standing in a fiduciary relation to the testator may lawfully be exerted to obtain a will or legacy, so long as the testator thoroughly understands what he is doing and is a free agent; and the burden of proof of undue influence lies upon those who assert it. *Hindson v. Wetherill*, 6 D. M. & G. 301; *Walker v. Smith*, 29 B. 394; *Parfitt v. Lawless*, 2 P. & D. 462.

The rules therefore applicable in the case of gifts *inter vivos* to persons standing in a fiduciary relation to the donor do not apply to wills. In the case of gifts *inter vivos*, such persons have to show that not only the donor intended to give, but that his intention was not influenced by the donee, a burden of proof which in most cases it is practically impossible to discharge, at any rate so long as the fiduciary relation subsists.

Undue
influence.

To establish a case of undue influence, it must be shown that fraud or coercion has been practised on the testator in relation to the will itself, not merely in relation to other matters or transactions. *Boyse v. Rossborough*, 6 H. L. 2; *Hall v. Hall*, 1 P. & D. 481; *Wingrove v. Wingrove*, 11 P. D. 81. See *Longford v. Purdon*, 1 L. R. Ir. 75.

A case of undue influence is more easily established where there is evidence to show that the person influenced was of feeble mental capacity or in a weak state of health. *Hampson v. Guy*, 64 L. T. 778.

If a testator is prevented by threats from altering his will the Court of Probate may, if the case is proved, declare the persons exercising the coercion trustees of the benefits they take under the will. *Betts v. Doughty*, 5 P. D. 26.

Will read over.

A will which has been read over to the testator, or the contents of which have been brought to his notice before execution, must, in the absence of fraud or coercion, be presumed to have been approved by him. *Guardhouse v. Blackburn*, 1 P. & D. 109; *Goodacre v. Smith*, *ib.* 359; *Atter v. Atkinson*, *ib.* 665;

Rhodes v. Rhodes, 7 App. C. 192 ; *Beamish v. Beamish* (1894) 1 I. R. 7. Chap. IV.

Words or clauses introduced into a will by fraud, accident, or mistake, without the knowledge of the testator, will be struck out of the will, although their rejection may affect the sense of the words which remain. *In bonis Wray*, I. R. 10 Eq. 267 ; *In bonis Duane*, 2 Sw. & T. 590 ; 31 L. J. P. 173 ; *In bonis Oswald*, 3 P. & D. 162 ; *Morrell v. Morrell*, 7 P. D. 68 ; *Rhodes v. Rhodes*, 7 App. C. 192 ; *In bonis Boehm*, (1891) P. 247 ; *In bonis Gordon*, (1892) P. 228 ; *In bonis Moore* (1892) P. 378. Fraud and mistake.

And clerical errors made in the engrossment have been corrected by substituting the right words. *In bonis Bushell*, 13 P. D. 7 ; *In bonis Huddleston*, 63 L. T. 255. See however *In bonis Walkeley*, 69 L. L. 419.

But where a testator has executed a will with knowledge of the contents, nothing can be added or omitted after his death on the ground of mistake. *In bonis Davy*, 1 Sw. & T. 262 ; *Guardhouse v. Blackburn*, 1 P. & D. 109 ; *Harter v. Harter*, 3 P. & D. 11 ; *Collins v. Elstone*, (1893) P. 1 ; *Beamish v. Beamish*, (1894) 1 I. R. 7.

Where a residuary legatee prepares the will and is directed to give further legacies which he purposely omits, and at the time when the will is read over and executed the further legacies are not present to the mind of the testator as the residuary legatee knows, the will will nevertheless be admitted to probate. *Mitchell v. Gard*, 3 Sw. & T. 75.

The remedy in such a case would appear to be to have the residuary legatee declared a trustee so far as regards the legacies omitted. As to whether such a declaration must be obtained in the Probate Division at the time when the will is proved, see *post*, p. 72.

The Court has, it seems, power to direct a passage containing a gross libel to be omitted from the probate copy of the will though it will not exercise the power merely on the ground that the charge is offensive and untrue. *In bonis Wartnaby*, 1 Rob. 423 ; *Marsh v. Marsh*, 1 Sw. & T. 528, 536, passages Omission of scandalous passages.

<u>Chap. IV.</u>	omitted. <i>Curtis v. Curtis</i> , 3 Add. 33; <i>In bonis Honeywood</i> , 2 P. & D. 251, omission refused.
Wills Act, s. 8.	By the Wills Act (1 Vict. c. 26), sect. 8, it is enacted that no will shall be valid unless it shall be in writing and executed in manner thereinafter mentioned.
1. Signature by testator.	The requirements as to execution are as follows:—in the first place the will must be signed at the foot or end thereof by the testator or by some other person in his presence or by his direction.
Intention to execute.	The signature of the testator must be intended as an act of execution of the will. A signature to each page of the will, where the last page is left unsigned, is not <i>prima facie</i> a sufficient execution. <i>Sweetland v. Sweetland</i> , 4 Sw. & T. 6; <i>Burke v. Moore</i> , 1 R. 9 Eq. 609; <i>In bonis Maddock</i> , 3 P. & D. 169.
Mark.	The mark of the testator is a sufficient signature, whether he can write or not. <i>Baker v. Denning</i> , 8 A. & E. 94; <i>Wilson v. Beddard</i> , 12 Sim. 28; <i>In bonis Bryce</i> , 2 Curt. 325; <i>In bonis Amiss</i> , 2 Rob. 116; <i>In bonis Douce</i> , 2 Sw. & T. 593; <i>In bonis Clarke</i> , 1 Sw. & T. 22. A stamped name is sufficient. <i>Jenkyns v. Gaisford</i> , 3 Sw. & T. 93; 11 W. R. 854.
Assumed name.	Signature in an assumed name is sufficient. <i>In bonis Glover</i> , 5 N. of C. 553; <i>In bonis Ridding</i> , 2 Rob. 339; <i>In bonis Clarke</i> , 1 Sw. & T. 22; <i>In bonis Douce</i> , 2 <i>ib.</i> 593.
Seal.	A seal is not sufficient. <i>Smith v. Evans</i> , 1 Wils. 313; <i>Grayson v. Atkinson</i> , 2 Ves. Sen. 459; <i>Ellis v. Smith</i> , 1 Ves. Jun. 13, 15; <i>Wright v. Wakeford</i> , 17 Ves. 459. The case of <i>Lemayne v. Stanley</i> , 3 Lev. 1; 1 Freem. 538, is overruled. But a seal with the testator's initials, and acknowledged as his hand and seal, is sufficient. <i>In bonis Emerson</i> , 9 L. R. Ir. 443.
Dry pen.	Passing a dry pen over a written signature is not enough. <i>Casement v. Fulton</i> , 5 Moo. P. C. 130; <i>Playne v. Scriven</i> , 1 Rob. 772; see <i>Kevil v. Lynch</i> , 1 R. 9 Eq. 249.
Signature by agent.	Another person, though he may be also an attesting witness, may by the testator's direction sign the testator's name, or impress a stamp with the testator's name engraved on it, or sign his own name on behalf of the testator. <i>Jenkyns v. Gaisford</i> , 11 W. R. 854; 3 Sw. & T. 93; <i>Clarke's Case</i> , 2 Curt.

329; *In bonis Bailey*, 1 Curt. 914; *Smith v. Harris*, 1 Rob. 262. Chap. IV.

The sheets of which a will consists need not be severally signed by the testator nor be connected together, but they must be in the same room where the execution took place. *Gregory v. Queen's Proctor*, 4 N. of C. 620; *Marsh v. Marsh*, 1 Sw. & T. 528; *Bond v. Seawell*, 3 Burr. 1773. Connection of
signature
with will.

And the signature must be physically connected with the will. *In bonis Horsford*, 3 P. & D. 211; *In bonis M'Key*, 1 R. 11 Eq. 220.

By the Wills Act Amendment Act, 1852 (15 & 16 Vict. c. 24), Position of
signature.
sect. 1, it is provided that a will shall be valid if the signature shall be so placed at or after or following or under or beside or opposite to the end of the will, that it shall be apparent on the face of the will that the testator intended to give effect by such his signature to the writing signed as his will (a), and no will shall be affected by the circumstance that the signature shall not follow, or be immediately after the foot, or end of the will, or by the circumstance that a blank space shall intervene between the concluding word of the will and the signature, or by the circumstance that the signature shall be placed among the words of the testimonium clause, or of the clause of attestation (b), either with or without a blank space intervening, or shall follow (c) or be after, or under, or beside the names or one of the names of the subscribing witnesses, or by the circumstance that the signature shall be on a side or page or other portion of the paper or papers containing the will whereon no clause, or paragraph, or disposing part of the will shall be written (d) above the signature, or by the circumstance that there shall appear to be sufficient space (e) on or at the bottom of the preceding side or page, or other portion of the same paper on which the will is written to contain the signature.
In bonis Jones, 34 L. J. P. 41; 4 Sw. & T. 1; *In bonis Williams*, 1 P. & D. 4; *In bonis Coombs*, 1 P. & D. 302; *In bonis Fuller* (1892) P. 377; *In bonis Ffrench*, 23 L. R. Ir. 438 (a); *In bonis Walker*, 2 Sw. & T. 354; *In bonis Casmore*, 1 P. & D. 653; *In bonis Pearn*, 1 P. D. 70 (b); *In bonis Puddephatt*, 2 P. & D. 97; *In bonis Horsford*, 3 P. & D. 211 (c); *In bonis Wright*, 34 L. J. P. 104; 4 Sw. & T. 35; *Hunt v.*

Chap. IV.

Hunt, 1 P. & D. 209; *In bonis Archer*, 2 P. & D. 252; *In bonis Wotton*, 3 P. & D. 159 (d); *In bonis Williams*, 1 P. & D. 4 (e).

Words under
signature.

The same section enacts that no signature shall be operative to give effect to any disposition or direction which is underneath or which follows it, nor shall it give effect to any disposition or direction inserted after the signature shall be made. See *In bonis Greator*, 2 Jur. N. S. 1172; *In bonis Dallow*, 1 P. & D. 189; *In bonis Ainsworth*, 2 P. & D. 151; *In bonis Dearle*, 39 L. T. N. S. 93; *In bonis Arthur*, 2 P. & D. 273.

If the signature of the testator intended to be in execution of the will is followed by words intended to form part of the will, effect may be given to the part of the will preceding the signature, if that part in effect constitutes the whole of the dispositive portion of the will. *Keating v. Brooks*, 2 Curt. 421; 4 N. of C. 260; *In bonis Davis*, 3 Curt. 748; *In bonis Cotton*, 6 N. of C. 307; 1 Rob. 658; see *In bonis Topham*, 7 N. of C. 272; 2 Rob. 189; *Sweetland v. Sweetland*, 4 Sw. & T. 6 (in which case the question was whether there was a due execution of any part of the will); *In bonis Wray*, 31 W. R. 476; *In bonis Anstee* (1893) P. 288.

The same rule applies if the words following the signature contain unimportant bequests or appoint executors only. *In bonis Standley*, 7 N. of C. 69; 1 Rob. 755; *In bonis Amis* 7 N. of C. 274; 2 Rob. 116.

Signature in the middle or in the margin of the will is not a sufficient signature. *Margary v. Robinson*, 12 P. D. 8; *In bonis Hughes*, 12 P. D. 107.

2. Signature
must be
witnessed.

In the second place, the signature shall be made or acknowledged by the testator in the presence of two or more witnesses present at the same time.

The signature of the testator must be written or acknowledged by the testator in the presence of both witnesses together, before either of them attest and subscribe the will. *In bonis Allen*, 2 Curt. 331; *In bonis Olding*, *ib.* 865; *In bonis Byrd*, 3 *ib.* 117; *Moore v. King*, *ib.* 243; *Pennant v. Kingscote*, *ib.* 643; *In bonis Summers*, 2 Rob. 295; *Cooper v.*

Bockett, 8 Curt. 648; 4 Moo. P. C. 419; *Hindmarsh v. Charlton*, 1 Sw. & T. 483; 8 H. L. 160; *Wyatt v. Berry* (1893) P. 5.

Chap. IV.

The Wills Act (1 Vict. c. 26), sect. 14, provides that if any person who shall attest the execution of a will shall, at the time of the execution thereof or at any time afterwards, be incompetent to be admitted a witness to prove the execution thereof, such will shall not, on that account, be invalid.

Will not void for incompetency of witness.

Sect. 15 enacts in effect that a will attested by a beneficiary under the will is valid, though the gift to the attesting witness is void. See p. 99.

Sect. 16 enacts that, in case by any will any real or personal estate shall be charged with any debt or debts, and any creditor, or the wife or husband of any creditor, whose debt is so charged, shall attest the execution of such will, such creditor, notwithstanding such charge, shall be admitted a witness to prove the execution of such will, or to prove the validity or invalidity thereof.

Sect. 17 enacts that no person shall, on account of his being an executor of a will, be incompetent to be admitted a witness to prove the execution of such will or a witness to prove the validity or invalidity thereof.

Where the testator writes something on the will in the presence of the witnesses summoned to attest the will, it will be presumed that he wrote his signature, though the witnesses may not see the signature and may not know that the document is his will. *Smith v. Smith*, 1 P. & D. 143; see *Wright v. Sanderson*, 9 P. D. 149; *Woodhouse v. Balfour*, 13 P. D. 2.

a. Signature made in presence of witnesses.

The acknowledgment may be by gestures. *In bonis Davies*, 2 Rob. 337; *In bonis Owston*, 10 W. R. 410.

b. Acknowledgment of signature already made.

Acknowledgment by a third person in the hearing of the testator, and acquiesced in by him, is an acknowledgment by the testator. *In bonis Jones*, Dea. & Sw. 3; *In bonis Bosanquet*, 2 Rob. 577; *Faulds v. Jackson*, 6 N. of C., supp. 12; *Inglesant v. Inglesant*, 3 P. & D. 172; *In bonis Bishop*, 30 W. R. 567.

It is clear that if the will is acknowledged to be the testator's will, and the witnesses see the signature of the testator, that is sufficient. *In bonis Dinmore*, 2 Rob. 641; *In bonis Philpot*, 3 N. of C. 2.

Will acknowledged; signature seen.

Chap. IV.

Will acknow-
ledged; signa-
ture not seen.

There is no sufficient acknowledgment, if the signature of the testator is covered up, so that the attesting witnesses do not see it. *Hudson v. Parker*, 1 Rob. 14; *In bonis Gunstan*; *Blake v. Blake*, 7 P. D. 102, overruling *Gwillim v. Gwillim*, 3 Sw. & T. 200; 29 L. J. Prob. 31; *Beckett v. Howe*, 2 P. & D. 1.

It seems there may be a sufficient acknowledgment, if the testator's signature might have been seen by the witnesses, if they had looked, though they may swear that they did not in fact see it. *In bonis Gunstan*; *Blake v. Blake*, 7 P. D. 102; see *Kelly v. Keatinge*, 1 R. 5 Eq. 175; *Lloyd v. Roberts*, 12 Moo. P. C. 158; *Cooper v. Bockett*, 4 Moo. P. C. 419; *Blake v. Knight*, 3 Curt. 547; *In bonis Huckvale*, 1 P. & D. 375; *In bonis Pearn*, 1 P. D. 71.

Signature
seen; will not
acknowledged.

A request to sign a paper not declared to be a will, when the witnesses see the signature of testator, though it is not acknowledged by the testator as his signature, is sufficient. *Keigwin v. Keigwin*, 3 Curt. 607; *Gaze v. Gaze*, 3 Curt. 451; *In bonis Ashmore*, 3 Curt. 756; *In bonis Thompson*, 4 N. of C. 643; *Faulds v. Jackson*, 6 N. of C. suppl. 1; *Leech v. Bates*, 6 N. of C. 704; *Inglesant v. Inglesant*, 3 P. & D. 172; *Daintree & Butcher v. Fasulo*, 13 P. D. 67, 102; see, however, *In bonis Arthur*, 2 P. & D. 273.

Signature not
seen; will not
acknowledged.

But a mere request to witnesses to attest an instrument, the nature of which is not explained to them, and the signature to which they do not see, is not sufficient. *In bonis Ashton*, 5 N. of C. 548; *In bonis Rawlins*, 2 Curt. 326; *In bonis Hammond*, 3 Sw. & T. 90; *In bonis Harrison*, 2 Curt. 863; *In bonis Pearson*, 33 L. J. P. 177; *Plott v. Genge*, 3 Curt. 160; 4 Moo. P. C. 265; *Hudson v. Parker*, 1 Rob. 14; *In bonis Trinder*, 3 N. of C. 275; *Shaw v. Neville*, 1 Jur. N. S. 408; *In bonis Swinford*, 1 P. & D. 630; *Pearson v. Pearson*, 2 P. & D. 451; *Fischer v. Popham*, 3 P. & D. 246.

When the testator's will is signed by some other person by his direction, the signature must be acknowledged by the testator in presence of two witnesses; it is not sufficient that the witnesses see the signature written if they are not present when the testator directs the signature to be made, and the will is not acknowledged as a will. *Burke v. Moore*, 1 R. 9 Eq. 609.

In the third place, such witnesses shall attest and subscribe the will in the presence of the testator, but no form of attestation is necessary. Chap. IV.
3. Signature by witnesses.

The witnesses must subscribe in the presence of the testator, but they need not subscribe in the presence of each other. Witnesses need not sign in each other's presence.
White v. British Museum, 6 Bing. 310; *Faulds v. Jackson*, 6 N. of C. sup. 1; *In bonis Webb*, 1 Jur. N. S. 1096; 2 *ib.*, 309; *Sullivan v. Sullivan*, 3 L. R. Ir. 299; see *Casement v. Fulton*, 5 Moo. P. C. 14.

The witnesses will be considered to have subscribed in the presence of the testator if, under the circumstances, the testator might have seen them if he had chosen to look, though he may not have seen them. Presence of the testator.
Shires v. Glascock, 2 Salk. 688; *Davy v. Smith*, 3 Salk. 395; *Todd v. Winchelsea*, M. & Malk. 12; 1 C. & P. 488; *Casson v. Dade*, 1 B. C. C. 99; *Doe v. Manifold*, 1 M. & S. 249; *Winchelsea v. Wauchope*, 3 Russ. 441; *In bonis Newman*, 1 Curt. 914; *In bonis Ellis*, 2 *ib.*, 395; *Newton v. Clarke*, 2 *ib.*, 320; *In bonis Colman*, 3 *ib.* 118; *Tribe v. Tribe*, 7 N. of C. 132; 1 Rob. 775; *Norton v. Bazett*, Dea. & Sw. 259; 2 Jur. N. S. 766; 3 Jur. N. S. 1084; *In bonis Trimnell*, 11 Jur. N. S. 248; *In bonis Piercy*, 1 Rob. 278; *Jenner v. Finch*, 5 P. D. 106.

The signatures of the witnesses need not be in any particular part of the will, if it appears that they were intended to attest the operative signature of the testator. Position of signatures.
In bonis Davis, 3 Curt. 748; *In bonis Chamney*, 1 Rob. 757; *Roberts v. Phillips*, 4 E. & B. 450; *In bonis Wilson*, 1 P. & D. 269; *In bonis Pearse*, 1 P. & D. 382; *In bonis Braddock*, 1 P. D. 433; *In bonis Stratley*, (1891) P. 172.

But the signatures, if not on the same paper as the will, must be on a paper physically connected with it. Signatures must be connected with will.
In bonis West, 12 W. R. 89; *In bonis Saunders*, 31 L. J. P. 53; *Cook v. Lambert*, 32 L. J. P. 93; 3 Sw. & T. 46; *In bonis Gausden*, 2 Sw. & T. 362; *In bonis M'Key*, I. R. 11 Eq. 220; *In bonis Braddock*, 1 P. D. 433.

Where the testator signs the will, and the witnesses sign a duplicate, the will is not sufficiently attested. *In bonis Hatton*, 6 P. D. 204.

Chap. IV.

Witnesses
must attest
operative
signature.

The witnesses must attest the signature, which is intended as an execution of the will ; and where there are several signatures, the attestation of any but that intended as an execution of the will is invalid to give effect to the will or any part of it. *In bonis Martin*, 6 N. of C. 694 ; 1 Rob. 712 ; *Ewen v. Franklin*, Deane, 7 ; 1 Jur. N. S. 1220 ; *Sweetland v. Sweetland*, 4 Sw. & T. 6 ; 34 L. J. P. 42 ; 13 W. R. 504 ; *Phipps v. Hale*, 3 P. & D. 166 ; *In bonis Dilkes*, 3 P. & D. 164.

Intention to
attest.

The attesting witnesses must subscribe with the intention, that the subscriptions made should be a complete attestation of the will, and evidence is admissible to show whether such was the intention or not. *In bonis Wilson*, 1 P. & D. 269 ; *In bonis Sharman*, 1 P. & D. 661 ; *Griffiths v. Griffiths*, 2 P. & D. 300 ; *In bonis Murphy*, I. R. 8 Eq. 300.

Adding an address to, or correcting a signature already made, or writing a christian name when the witness is unable to complete his signature, is insufficient. *In bonis Trevanion*, 2 Rob. 315 ; 14 Jur. 919 ; *Hindmarsh v. Charlton*, 1 Sw. & T. 433 ; 8 H. L. 160 ; *In bonis Maddock*, 3 P. & D. 169 ; *McConville v. McCreesh*, 3 L. R. Ir. 73.

So a witness writing the name of a second witness opposite the mark of the latter cannot be said to subscribe. *In bonis Eynon*, 3 P. & D. 92.

A signature made without any intention of attesting will be excluded from probate. *In bonis Sharman*, 1 P. & D. 661 ; *In bonis Murphy*, I. R. 8 Eq. 300 ; *In bonis Smith*, 15 P. D. 2.

Form of
signature.

Witnesses need not sign by name ; initials, or a description, or a mark, are sufficient. *In bonis Christian*, 2 Rob. 110 ; 7 N. of C. 265 ; *In bonis Martin*, 6 N. of C. 694 ; *In bonis Sperling*, 3 Sw. & T. 272 ; 12 W. R. 354 ; *In bonis Amiss*, 2 Rob. 116 ; *In bonis Ashmore*, 3 Curt. 756.

But a seal is insufficient. *In bonis Byrd*, 3 Curt. 117.

One witness cannot sign for another. *In bonis White*, 2 N. of C. 461 ; *In bonis Middleton*, 33 L. J. P. 16 ; *Re Duggins*, 39 L. J. P. 24.

Nor can a third person sign for a witness. *In bonis Cope*, 2 Rob. 335 ; *Pryor v. Pryor*, 29 L. J. P. 114.

And a witness cannot sign in the name of another person.
In bonis Leverington, 11 P. D. 80.

But a witness or a third person may guide the hand of the second witness, or may subscribe for the witness if the witness holds the top of the pen while the signature is being made. *Harrison v. Elvin*, 3 Q. B. 117 ; 2 G. & D. 769 ; *In bonis Frith*, 4 Jur. N. S. 288 ; 27 L. J. P. 6 ; *In bonis Lewis*, 31 L. J. P. 153 ; 7 Jur. N. S. 688 ; see *In bonis Kilcher*, 6 N. of C. 15.

The papers found at the testator's death to compose his will must, in the absence of proof to the contrary, be presumed to be the will executed by him. *Gregory v. Queen's Proctor*, 4 N. of C. 620 ; *Marsh v. Marsh*, 1 Sw. & T. 528 ; *Rees v. Rees*, 3 P. & D. 84.

CHAPTER V.

ALTERATIONS, INTERLINEATIONS, AND ERASURES.

Chap. V.
Blank spaces.

It is immaterial that the will contains blank spaces or even a blank page. *Corneby v. Gibbons*, 1 Rob. 705; *In bonis Rice*, I. R. 5 Eq. 176; *In bonis Wotton*, 3 P. & D. 159.

Oral and written declarations of a testator made before or after the execution of the will are admissible in evidence for the purpose of showing what were the constituent parts of the will at the time of execution. *Gould v. Lakes*, 6 P. D. 1.

Evidence
when altera-
tions made.

Where a will contains obliterations, additions, or other alterations, evidence must, if possible, be produced to show when they were made. *In bonis Hindmarch*, 1 P. & D. 307; *In bonis Duffy*, I. R. 5 Eq. 506; *Moore v. Moore*, I. R. 6 Eq. 166; *In bonis Tonge*, 66 L. T. 60.

For this purpose declarations of the testator with regard to his testamentary intentions made before the date of the will are admissible. *Doe v. Palmer*, 16 Q. B. 747; *In bonis Sykes*, 3 P. & D. 26; *Dench v. Dench*, 2 P. D. 60.

The fact that a date earlier than the date of the will is annexed to alterations is not alone sufficient to show that they were made before execution. *In bonis Adamson*, 3 P. & D. 253.

As to the proper inference where there is evidence that some at least of the alterations in a will were made before execution, See *Williams v. Ashton*, 1 J. & H. 115; *Moore v. Moore*, I. R. 6 Eq. 166; *Doherty v. Dwyer*, 25 L. R. Ir. 297.

Presumption
as to altera-
tions.

Alterations made in ink before execution will be presumed to be final. *Gann v. Gregory*, 3 D. M. & G. 780; *Ibbott v. Bell*, 35 B. 395.

Alterations made before execution in pencil, the will being written in ink, are *prima facie* deliberative, and the original writing will have effect. *Hawkes v. Hawkes*, 1 Hag. 322; *Edward v. Astley*, *ib.* 490; *Ravenscroft v. Hunter*, 2 *ib.* 68; *Parkin v. Bainbridge*, 3 Phillim. 321; *Lavender v. Adams*, 1 Add. 403; *Bateman v. Pennington*, 3 Moo. P. C. 223; *Francis v. Grover*, 5 Ha. 39; *In bonis Hall*, 2 P. & D. 256; *In bonis Adams*, *ib.* 367. See *In bonis Bellamy*, 14 W. R. 501.

Chap. V.
Deliberative
alterations.

Alterations and additions made in a will complete without them must be presumed, in the absence of evidence, to have been made after the execution of the will or any subsequent codicil. *Cooper v. Bockett*, 4 N. of C. 685; 4 Moo. P. C. 419; *Simmons v. Rudall*, 1 S. N. S. 115; *Greville v. Tylee*, 7 Moo. P. C. 320; *Gann v. Gregory*, 3 D. M. & G. 780; *Doe v. Palmer*, 16 Q. B. 747; *Williams v. Ashton*, 1 J. & H. 115; *Christmas v. Whynycles*, 3 Sw. & T. 81; *In bonis Sykes*, 3 P. & D. 26.

Presumption
as to date of
alteration.

Alterations and additions made in a will which would be incomplete without them, must be presumed to have been made before execution. *In bonis Cadge*, 1 P. & D. 543; *Birch v. Birch*, 1 Rob. 675; 6 N. of C. 581; *In bonis Swinden*, 2 Rob. 192; *Greville v. Tylee*, 7 Moo. P. C. 320; *In bonis Birt*, 2 P. & D. 214; *In bonis Adams*, *ib.* 367; *In bonis King*, 23 W. R. 552. See, however, *In bonis White*, 30 L. J. P. 55.

Interlineations and alterations made in a will which is afterwards confirmed by a codicil are admitted to probate if it appears from the codicil or otherwise that they were made before the execution of the codicil. *Tyler v. Merchant Taylors'*, 15 P. D. 216; *In bonis Heath*, (1892) P. 253.

Alterations
after date of
will and
before codicil.

The Wills Act (1 Vict. c. 26), sect. 21, enacts that no obliteration, interlineation, or other alteration made in any will after the execution thereof shall be valid or have any effect, except so far as the words or effect of the will before such alteration shall not be apparent, unless such alteration shall be executed in like manner as hereinbefore is required for the execution of the will; but the will, with such alteration as part thereof, shall be deemed to be duly executed if the signature of the testator and the subscription of the witnesses be made in the margin, or

Wills Act,
s. 21.

Chap. V.

on some other part of the will opposite or near to such alteration, or at the foot or end of or opposite to a memorandum referring to such alteration, and written at the end or some other part of the will.

An alteration opposite which the testator and two witnesses have set their initials in the margin is sufficiently executed under this section. *In bonis Blewitt*, 49 L. J. P. 31; 5 P. D. 116; see, too, *In bonis Treeby*, 3 P. & D. 242; *In bonis Shearn*, 50 L. J. P. 15.

A sentence commenced on the second page and carried over to the third was admitted to probate, though the testator and witnesses had initialed only the second page. *In bonis Wilkinson*, 6 P. D. 100.

Obliteration
complete.

Where the original is completely obliterated and not ascertainable, the will must be considered blank, so far as the obliteration, interlineation or other alteration is concerned. *In bonis Ibbetson*, 2 Curt. 337; *Townley v. Watson*, 3 Curt. 761; *In bonis James*, 1 Sw. & T. 238; *Doherty v. Dwyer*, 25 L. R. Ir. 297.

The Court will only endeavour to discover the original by the use of glasses or similar means, and not by the use of chemicals, or removal of any substance from the will. *In bonis Beavan*, 2 Curt. 369; *In bonis Horsford*, 3 P. & D. 211; *In re Nelson*, I. R. 6 Eq. 569. See *Lushington v. Onslow*, 6 N. of C. 183; *Ffinch v. Combe*, (1894) P. 191.

But where a testatrix wrote something on the back of a codicil and subsequently pasted a piece of blank paper over the writing, it was held that the paper might be removed. *In bonis Gilbert*, (1893) P. 183.

It appears to be clear that no external evidence would be admitted to show what the original words were, except in a case of dependent relative revocation (see *post*, p. 39). *In bonis Horsford*, 3 P. & D. 211; *In re Nelson*, I. R. 6 Eq. 569. See *Townley v. Watson*, 3 Curt. 761; *Jeffery v. Cancer Hospital*, 57 L. T. 600.

The decision of the Probate Division upon a question of interlineation will be adopted upon a question relating to a devise of realty under the same will. *In re Cruttenden*; *Davey v. Lansdell*, 80 W. R. 57.

CHAPTER VI.

REVOCATION.

SECT. 18 of the Wills Act enacts that every will made by a man or woman shall be revoked by his or her marriage (except a will made in exercise of a power of appointment when the real or personal estate thereby appointed would not in default of such appointment pass to his or her heir, customary heir, executor, or administrator, or the person entitled as his or her next of kin, under the Statute of Distributions).

Chap. VI.

Will to be
revoked by
marriage.

Where a will made in exercise of a power which would not be revoked by marriage disposes of other property of the testator, it will be revoked by marriage only so far as regards the property not subject to the power. *In bonis Russell*, 15 P. D. 111.

A will, though made in contemplation of marriage, is revoked by marriage. *In bonis Cadwold*, 1 Sw. & T. 34; *Marston v. Doe d. Fox*, 8 A. & E. 14; *Israell v. Rodon*, 2 Moo. P. C. 51.

A will made in exercise of a power is not revoked by marriage where the heir, executor, or administrator, or statutory next of kin, would not in all events take in default of appointment. *In bonis Fenwick*, 1 P. & D. 319; *In bonis Worthington*, 20 W. R. 260.

Will under
power.

Nor is such a will revoked by marriage if the persons taking in default of appointment, though they may in fact be the heir or statutory next of kin of the donee of the power, do not take in that capacity under the instrument creating the power.

Thus the will is not revoked if the gift in default of appointment is to children of the testator, or to the next of kin simply instead of statutory next of kin. *In bonis Fitzroy*, 1 Sw. & T.

Chap. VI.

133; *In bonis McVicar*, 1 P. & D. 671; see *In bonis Russell*, 15 P. D. 111.

Where the limitation of real estate in default of appointment is to the donee, her heirs or assigns, the will is revoked by marriage. *Vaughan v. Vanderstegen*, 2 Dr. 165, 168.

No will to be
revoked by
presumption.

By the Wills Act (1 Vict. c. 26), sect. 19, it is enacted that no will shall be revoked by any presumption of an intention on the ground of an alteration of circumstances.

No will to be
revoked but
by another
will or codicil,
or by destruc-
tion.

Sect. 20 enacts that "no will or codicil, or any part thereof, shall be revoked otherwise than as aforesaid, or by another will or codicil executed in manner hereinbefore required, or by some writing declaring an intention to revoke the same, and executed in the manner in which a will is hereinbefore required to be executed, or by the burning, tearing, or otherwise destroying the same by the testator, or by some person in his presence, and by his direction, with the intention of revoking the same."

Where a will has been destroyed against the wishes of a testator, it is doubtful whether he can subsequently ratify such destruction. *Mills v. Millward*, 15 P. D. 20.

As to what constitutes a "writing declaring an intention to revoke the same," see *In bonis Gosling*, 11 P. D. 79.

A statement in the attestation clause of a codicil that a previous codicil is revoked does not revoke the codicil. *In bonis Atkinson*, 8 P. D. 165.

Revocation
while insane
invalid.

Revocation while the testator is of unsound mind is ineffectual, though he may subsequently recover. *Borlase v. Borlase*, 4 N. of C. 106; *Brunt v. Brunt*, 3 P. & D. 37; *In bonis Hine*, (1893) P. 282.

A will left in the possession of a testator who subsequently becomes insane, and revoked by him, must be shown to have been revoked while he was of sound mind. *Harris v. Berrall*, 1 Sw. & T. 153; *Sprigge v. Sprigge*, 1 P. & D. 608.

Act of des-
truction not
done *animo*
revocandi.

Revocation is in all cases a question of intention, and if the act done, though in itself sufficient to revoke a testamentary instrument, can be shown to have been done for a purpose other than revocation, it will not revoke the instrument.

Thus destruction of a will on the erroneous supposition that it is invalid (a), or that it has been revoked or become

useless (b), or that another instrument is valid (c), will not effect a revocation. *Giles v. Warren*, 2 P. & D. 401; *In bonis Thornton*, 14 P. D. 82, (a); *Scott v. Scott*, 1 Sw. & T. 258; *Clarkson v. Clarkson*, 2 Sw. & T. 497; 31 L. J. P. 143; *In bonis Middleton*, 3 Sw. & T. 583; 10 Jur. N. S. 1109 (b); *Hyde v. Hyde*, 1 Eq. Ab. 409; *Onions v. Tyrer*, 1 P. W. 345; *Perrott v. Perrott*, 14 East, 423; *Dancer v. Crabb*, 3 P. & D. 98 (c).

Some of the cases above cited have been called cases of dependent relative revocation. They are really cases in which there was no *animus revocandi* whatever. The instruments were destroyed, not with a view to revoke them, but because the testator thought they had been revoked.

In the same way the destruction of a codicil which has revived a revoked will, will not revoke the will if it appears that the codicil was destroyed on the supposition that the will would still stand. *James v. Shrimpton*, 1 P. D. 431.

So, too, an act of destruction done merely for the purpose of making a fair copy of the will, or to improve the handwriting, has no revocatory effect. *In bonis Kennett*, 2 N. R. 461; *In bonis Applebee*, 1 Hag. 144; *In bonis Tozer*, 2 N. of C. 11.

A revocation made with a view of making or reviving some other disposition will only take effect if such other disposition is effectually made or revived. *Onions v. Tyrer*, 1 P. W. 343; 2 Vern. 742; Prec. Ch. 459; 1 Eq. Ab. 408; *Ex parte Ilchester*, 7 Ves. 348, 372; *Lord Thynne v. Stanhope*, 1 Add. 52.

Dependent
relative
revocation.

But to bring the case within this doctrine it must appear that the testator considered the substitution of some valid disposition as part of the act of revocation at the time when the act was done.

The mere revocation of a will, followed by a subsequent ineffectual disposition, will not set up the original will if the two acts are not so connected, that it can be said the substitution of an effectual disposition was the condition of the revocation of the original will. *In bonis Mitcheson*, 32 L. J. P. 202; *In bonis Weston*, 1 P. & D. 633; *In bonis Gentry*, 3 P. & D. 80.

The point in these cases is not, that a revoked will is set up again, if a subsequent disposition is ineffectual, but that the

Chap. VI.

original will is not itself intended to be revoked, unless or until an effectual disposition of the property is made. See *Powell v. Powell*, 1 P. & D. 209; *In bonis Weston*, 1 P. & D. 633; *Eckersley v. Platt*, 1 P. & D. 281.

In cases of revocation the intention of the testator may always be proved by evidence.

Will revoked
to make fresh
will.

Thus, if a will is shown to have been cancelled for the purpose of making a fresh will, the original will is not revoked if no fresh will is made. *In bonis De Bode*, 5 N. of C. 189; *In bonis Eeles*, 2 Sw. & T. 600.

Nor, under similar circumstances, is the old will revoked if the fresh will, though made, is not effectual. *Hyde v. Mason*, Vin. Abr. Devise, R. 2, pl. 17; Com. 451; 1 Lee, 423, note (a); *Dancer v. Crabb*, 3 P. & D. 98.

To set up
prior will.

Similarly, a will cancelled in order to set up a prior will which cannot be so set up, is not thereby revoked. *Powell v. Powell*, 1 P. & D. 209; see *Dickinson v. Swatman*, 4 Sw. & T. 205; *Eckersley v. Platt*, 1 P. & D. 281; *In bonis Weston*, 1 P. & D. 633; *Welch v. Gardner*, 51 J. P. 760.

Perhaps where a will is cancelled upon the execution of another invalid instrument which differs from the cancelled will only in matters of detail, such as the persons appointed trustees, the fact that the dispositions in the two documents are the same would, even in the absence of express evidence of intention, be sufficient to show that the prior will was only intended to be revoked if the second instrument was effectual. See *Onions v. Tyrer*, 1 P. W. 343; *Short v. Smith*, 4 East, 419; *In bonis Middleton*, 3 Sw. & T. 583.

Obliteration
of part of
legacy.

Upon the same principle, when the amount of a bequest is obliterated after the execution of the will, and a different, even though it may be a smaller, amount is written over or interlineated, the substituted bequest being incapable of taking effect, the original bequest remains, the inference being that it was the testator's intention to revoke the original bequest only if the substituted bequest was effectually made. *Brooke v. Kent*, 3 Moo. P. C. 334, overruling *In bonis Brooke*, 2 Curt. 343; *Soar v. Dolman*, 3 Curt. 121, overruling S. C. *nom. In bonis Rippin*, 2 Curt. 332; *In bonis Horsford*, 3 P. & D. 211;

In re Nelson, I. R. 6 Eq. 569; *Sturton v. Whellock*, 31 W. R. 382; see *Kirke v. Kirke*, 4 Russ. 435; *Locke v. James*, 11 M. & W. 901; *Winson v. Pratt*, 2 B. & B. 650. The case of *In bonis Livock*, 1 Curt. 906, is overruled. Chap. VI.

In such a case evidence is admissible to show what the original legacy was, and if necessary the Court will employ chemical means to ascertain it. *In bonis Horsford*, *supra*—see *ante*, p. 34.

If there is an erasure simply, without any substitution or interlineation, the doctrine does not apply, even though the erasure may be of part of a legacy—as for instance, where a legacy of one hundred and fifty pounds is given, and the words “and fifty” are erased. *In bonis Ibbetson*, 2 Curt. 337; *In bonis Horsford*, 3 P. & D. 211; *In re Nelson*, I. R. 6 Eq. 569. Erasure without interlineation.

The distinction between a case where the words “one hundred and fifty” are obliterated and the word “fifty” is written over them, and a case where the words “one hundred and” are obliterated, leaving the word “fifty,” is somewhat thin.

Upon similar principles, when the name of an executor has been obliterated and another executor substituted after the execution of the will, the name of the original executor will be restored, if it can be shown by external evidence what the name was. The presumption that the testator intended to appoint some executor or other is a strong one. *In bonis Parr*, 29 L. J. P. 70; 6 Jur. N. S. 56; *In bonis Harris*, 1 Sw. & T. 536; 29 L. J. P. 79; *In bonis Greenwood*, (1892) P. 7. Erasure of name of executor.

Where the name of a legatee is obliterated, and that of another legatee substituted after execution, and there is no further evidence of intention, no case of dependent relative revocation arises. Under such circumstances, however, a case of dependent relative revocation may be raised by proper evidence. Erasure of name of legatee.

Thus, if it appears from external evidence that a gift has been made to a person only on the supposition by the testator that another person was incapable of taking, and after the execution of the will the name of the first person has been

Chap. VI.

obliterated and the name of the second substituted, the original legatee takes on the ground that he was intended to take in the event of the substituted legatee being incapable of taking. *In bonis McCabe*, 3 P. & D. 94.

Distinction
between cases
of probate
and cases of
construction.

The cases on the doctrine of dependent relative revocation so far discussed have been cases in the Probate Court, where evidence of testamentary intention is always admissible.

Precisely the same doctrine applies in a Court of Construction, the only difference being that the intention to revoke a former gift only if a subsequent gift is effectually made must appear on the face of the instrument. No external evidence to prove the dependency of the two gifts is admissible.

Thus, if a legacy is given by will to A, and by a codicil the legacy to A is revoked, and the same legacy is given to B, who predeceases the testator, or for other reasons is incapable of taking, the legacy to A is nevertheless revoked. There is in such a case nothing to show that the legacy to A was only to be revoked if the legacy to B was effectually made, or in other words, no case of dependent relative revocation is made out. *French's Case*, Rolle's Ab. Devise, O. 4; *Tupper v. Tupper*, 1 K. & J. 665; *Nevill v. Boddam*, 28 B. 554; *Quinn v. Butler*, 6 Eq. 225; *Baker v. Story*, 23 W. R. 147.

Incapacity of
beneficiary.

It has been said that the doctrine of dependent relative revocation has no application, where the second disposition fails not from the infirmity of the instrument, but from the incapacity of the beneficiary. 1 Jarm. 156, 3rd ed.; 1 Wms. Exors. 131.

But this is a mere distinction of fact and not of principle. It may even be doubted whether it reconciles the cases in fact. See *Quinn v. Butler*, 6 Eq. 225. The true theory seems to be, that the doctrine of dependent relative revocation applies equally where the second legatee is incapacitated from taking, provided the case can be brought within the doctrine, or in other words, provided it can be shown that the original legacy was intended to be revoked only in the event of the second taking effect. The mere fact that a legacy is revoked and a different legacy to a different legatee substituted, affords no argument either in the Court of Probate or in a Court of Construction that the capacity

of the second legatee to take was the condition of the revocation of the earlier legacy.

A subsequent will is no revocation of a former one if the contents of the later will are unknown, or if, though it is known that the later will differed from the former one, it is unknown in what respects it differed. *Hitchins v. Basset*, 3 Mod. 204; 2 Salk. 592; Show. P. C. 146; *Dickinson v. Stidolph*, 11 C. B. N. S. 341, 357; *Hellicr v. Hellicr*, 9 P. D. 237; see *McAra v. McCay*, 23 L. R. Ir. 138; see also 19 Ind. Ap. 87.

Subsequent will—contents unknown.

Where there are several testamentary instruments which are not inconsistent, they will together be considered the will of the testator so far as they are not inconsistent. *In bonis Budd*, 3 Sw. & T. 196; *Berks v. Berks*, 4 Sw. & T. 23; *Lemage v. Goodban*, 1 P. & D. 57; *In bonis Fenwick*, *ib.* 319; *In bonis Griffith*, 2 *ib.* 457; *In bonis Patchell*, 3 *ib.* 153; *In bonis Hartley*, 50 L. J. P. 1; *In bonis Hodgkinson*, 69 L. T. 150.

Several testamentary instruments.

The fact that both instruments appoint a person sole executor will not cause the later instrument to revoke the former. *In bonis Leese*, 2 Sw. & T. 442; *In bonis Graham*, 3 *ib.* 69; *Geares v. Price*, 3 *ib.* 71.

Where a subsequent will disposes or shows an intention of disposing of all the testator's property, it will be held to have revoked a prior will *in toto*, whether the dispositions contained in the subsequent will are different from the earlier dispositions or not. *Henfrey v. Henfrey*, 2 Curt. 468; 4 Moo. P. C. 29; *Pepper v. Pepper*, 1 R. 5 Eq. 85; *Plenty v. West*, 2 Phillim. 264; *Cottrell v. Cottrell*, 2 P. & D. 397; *Dempsey v. Lawson*, 2 P. D. 98; *O'Leary v. Douglass*, 3 L. R. Ir. 323; *In re M'Farlane*, 13 L. R. Ir. 264; *In bonis Turnour*, 56 L. T. 671; *In bonis Palmer*; *Palmer v. Peat*, 58 L. J. P. 44.

Inconsistent instruments.

This doctrine applies even though the second will cannot be found, and must be presumed to have been revoked. *McAra v. McCay*, 23 L. R. Ir. 138.

Where there are two testamentary instruments, and from their nature and the surrounding circumstances it is doubtful whether the later was intended to be in substitution for the earlier one, evidence is admissible to show the intention. *Jenner v. Ffinch*, 5 P. D. 106; *Wainewright v. Wainewright*, 71 L. T. 265.

- Chap. VI.** The description of a testamentary document as the last will
- Last will.** of the testator will not alone have the effect of revoking prior testamentary papers. *Cutto v. Gilbert*, 9 Moo. P. C. 131 ; *Stoddart v. Grant*, 1 Macq. 171 ; *Lemage v. Goodban*, 1 P. & D. 57 ; *Leslie v. Leslie*, I. R. 6 Eq. 332 ; *Freeman v. Freeman, Kay*, 479 ; 5 D. M. & G. 704 ; *In bonis De la Saussaye*, 3 P. & D. 42 ; *In re O'Connor*, 13 L. R. Ir. 406.
- Clause of revocation.** A will containing a clause revoking all former wills revokes a will made in execution of a general or special power. *Sotheran v. Dening*, 20 Ch. D. 99 ; *Harvey v. Harvey*, 23 W. R. 476 ; *In re Kingdon* ; *Wilkins v. Pryer*, 32 Ch. D. 604 ; see *In bonis Tenney*, 45 L. T. 78.
- In several cases where a will was made in exercise of a power, a second will made in exercise of another power and containing a general clause of revocation, has been held not to revoke the first will. *In bonis Meredith*, 29 L. J. P. 155 ; *In bonis Merritt*, 1 Sw. & T. 112 ; 7 W. R. 543 ; *In bonis Joys*, 30 L. J. P. 169 ; 4 Sw. & T. 214 ; see *Richardson v. Barry*, 3 Hag. 249 ; *In re Kingdon* ; *Wilkins v. Pryer*, 32 Ch. D. 604.
- A will under a power is revoked if a subsequent will contains an express reference to the power, or disposes of the property subject to the power, though it may not dispose of all of it. *Richardson v. Barry*, 3 Hag. 249 ; *In bonis Eustace*, 3 P. & D. 183 ; *Harvey v. Harvey*, 23 W. R. 478.
- And a testamentary appointment under a general power is revoked by a subsequent will containing a residuary bequest. *In re Gibbes' Settlement* ; *White v. Randolph*, 37 Ch. D. 143.
- Codicil reviving revoked will.** A codicil reviving a revoked will thereby revokes a will intermediate in date between the first revoked will and the codicil, and inconsistent with the first will. *Lord Walpole v. Orford*, 3 Ves. 402 ; *In bonis Reynolds*, 3 P. & D. 35.
- Codicil reviving destroyed will.** Where will A is revoked by will B and destroyed, and there is a codicil, purporting to revive will A but ineffectual to do so, because will A is not in existence, the question arises, whether will B is revoked.
- The cases on this subject are complicated. The rule appears to be, that if there are no dispositions in the codicil inconsistent

with will B, the mere fact, that the codicil is described as a codicil to will A, does not revoke will B. *Rogers v. Goodenough*, 2 Sw. & T. 342. Chap. VI.

On the other hand, if the codicil contains dispositions inconsistent with will B, or expressly confirms will A, it seems will B is revoked, and the codicil alone is admissible to probate. *Hale v. Tokelove*, 2 Rob. 318; *Newton v. Newton*, 12 Ir. Ch. 118.

The destruction or cancellation of a will, whereby it is revoked, will not revoke a codicil. *In bonis Dutton*, 3 Sw. & T. 66; *In bonis Ellice*, 12 W. R. 353; *In bonis Halliwell*, 4 N. of C. 400; *In bonis Coulthard*, 11 Jur. N. S. 184; *Tagart v. Hooper*, 1 Curt. 289; *Black v. Jobling*, 1 P. & D. 685; *In bonis Savage*, 2 ib. 78; *In bonis Turner*, ib. 403; *Gardiner v. Courthope*, 12 P. D. 14; *In bonis Clements*, (1892) P. 254. Revocation of codicil.

But if will and codicil are on the same piece of paper, cutting off the signature to the will will revoke the codicil, if the intention was to revoke both. *In bonis Bleckley*, 8 P. D. 169.

Where a will is revoked by a subsequent codicil, it would be a question of construction, whether intermediate codicils are also revoked. Effect of codicil revoking will on earlier codicils.

If the revoking codicil refers to the will by date, or distinguishes between the will and subsequent codicils, the latter are not revoked. *Farrer v. St. Catharine's Coll.*, 16 Eq. 19; see *Bunny v. Bunny*, 3 B. 109; *Pratt v. Pratt*, 14 Sim. 129.

The re-execution of a will, containing a clause revoking all former testamentary instruments, will not revoke a codicil to the will, at any rate if the object of the re-execution appears to have been to give effect to alterations in the will, or if there is evidence to show that revocation of the codicil was not intended. *Wade v. Nazer*, 1 Rob. 627; *Upfill v. Marshall*, 3 Curt. 636; *In bonis Rawlins*, 48 L. J. P. 64; 28 W. R. 139. Re-execution of will containing clause of revocation.

A codicil making an alteration in a will, referred to as a will of a particular date, and confirming that will, does not, without other circumstances, revoke intermediate codicils. *Smith v. Cunningham*, 1 Add. 448; *Crosbie v. Macdoul*, 4 Ves. 610; *In bonis De la Saussaye*, 3 P. & D. 42; *Green v. Tribe*, 9 Ch. D. 231. Codicil confirming will.

Chap. VI.

But an intermediate codicil may in effect be revoked if the second codicil shows an intention to confirm the will without the alteration made by the intermediate codicil. *McLeod v. McNab*, (1891) A. C. 471, P. C.

A codicil confirming the will except as altered by an earlier codicil referred to by its date does not revoke an intermediate codicil by which alterations have been made in the will. *Follett v. Pettman*, 23 Ch. D. 337.

Testamentary
letter.

A letter, duly signed and attested, requesting a third person to destroy the testator's will, is sufficient to revoke it. *In bonis Durance*, 2 P. & D. 406.

Revocation by
succession of
acts.

Where a testator intends to revoke his will by the performance of a succession of acts, some only of which he actually performs, the will is not revoked, though the acts performed might alone be sufficient to revoke it if the testator intended to do no more. *Doe v. Perkes*, 3 B. & A. 489; *In bonis Colberg*, 2 Curt. 832; *Elms v. Elms*, 1 Sw. & T. 155. See, too, *Winson v. Pratt*, 2 B. & B. 650; *Locke v. James*, 11 M. & W. 901; *Kirke v. Kirke*, 4 Russ. 435; *Doe v. Harris*, 6 A. & E. 209; 2 N. & P. 615.

Acts done
must be those
named in
statute.

But though a testator may have done everything which he considered necessary to revoke his will, the will is not revoked if he has not adopted one or other of the modes of revocation pointed out in sect. 20. (See *ante*, p. 36.)

Thus, writing across a will that it is revoked, and throwing it into the waste paper basket, will not revoke the will if it is in fact preserved. *Cheese v. Lovejoy*, 2 P. D. 251. See *Andrew v. Motley*, 12 C. B. N. S. 514.

Revocation by
third person.

The revocatory acts, if done by a third person by the testator's direction, must also be done in his presence.

Thus, a will burnt by the testator's order but not in his presence, is not revoked. *In bonis Dadds*, Dea. & Sw. 290; *Clark v. Dixon*, 8 Times L. R. 11.

Striking
through
signature.

Striking through the will or the signature of the testator with a pen, or partial erasure of the signature by a knife, is not sufficient to revoke his will. *Stephens v. Taprell*, 2 Curt. 458; *In bonis Rose*, 4 N. of C. 101; *Benson v. Benson*, 2 P. & D.

172; *Re Brewster*, 6 Jur. N. S. 56; *In bonis Godfrey*, 69 L. T. 22. Chap. VI.

A will found in the possession of the testator with the signature cut off or scratched away will, in the absence of evidence to the contrary, be presumed to be revoked. *In bonis Lewis*, 1 Sw. & T. 31; *Walker v. Armstrong*, 21 B. 305; 4 W. R. 770; *In bonis Gullan*, 1 Sw. & T. 23; *Hobbs v. Knight*, 1 Curt. 768; *Bell v. Fothergill*, 2 P. & D. 148; *In bonis Morton*, 12 P. D. 141. Tearing off signature.

And this is the case, though the piece cut off may be carefully preserved with the will. *In bonis Simpson*, 5 Jur. N. S. 1366; *In re White*, 3 L. R. Ir. 413; *Bell v. Fothergill*, 2 P. & D. 148; *Magnesi v. Hazelton*, 44 L. T. 586.

Obliterating or tearing off the names of the attesting witnesses is sufficient to revoke the will. *In bonis James*, 7 Jur. N. S. 52; *Abraham v. Joseph*, 5 Jur. N. S. 179; *Evans v. Dallow*, 31 L. J. P. 128. Tearing off names of witnesses.

Tearing off the name of one of the attesting witnesses would, no doubt, be sufficient to revoke the will. But the will is not revoked, if the name is carefully preserved with the will, and there is other evidence from the mode in which the piece cut off has been treated to rebut the presumption of revocation. *In bonis Wheeler*, 49 L. J. P. 29; *In bonis Taylor*, 63 L. T. 230.

The destruction of signatures not necessary to the validity of the will, but recited in the attestation clause to have been made, is sufficient to revoke the will. *Price v. Price*, 3 H. & N. 341; *Lumbell v. Lumbell*, 3 Hag. 568; *Davies v. Davies*, 1 Ca. t. Lee, 444; *Williams v. Tyley*, Johns. 530; *In bonis Harris*, 3 Sw. & T. 485. Tearing off signatures recited to have been made.

Where a portion of the will not necessary to its validity as a testamentary instrument is destroyed, the question is whether the portion destroyed is so important as to raise the presumption that the rest cannot have been intended to stand without it, or whether it is unimportant and independent of the rest of the will. *Clarke v. Scripps*, 2 Rob. 563; *In re White*, 3 L. R. Ir. 413. Destruction of portion of will.

Thus, the destruction of a clause at the commencement of a

Chap. VI.

will, or cutting out various legacies, or a clause appointing executors, will not revoke the rest. *In bonis Woodward*, 2 P. & D. 206; *In bonis Nelson*, 1 R. 6 Eq. 569; *In bonis Maley*, 12 P. D. 134; *In bonis Leach*, 63 L. T. 111.

On the other hand, where the middle pages only of a will were preserved, the whole was held to be revoked, though each page had been signed and attested. *In bonis Gullan*, 1 Sw. & T. 23; *Gullan v. Grove*, 26 B. 64; where the facts are badly stated. See *Treloar v. Lean*, 14 P. D. 49.

A gift by deed of property disposed of by a prior will is not a revocation of the will, though it may make the will ineffectual. *Ford v. De Pontes*, 30 B. 572.

Will in
duplicate.

Where a will is executed in duplicate, one of which the testator retains while he deposits the other in the custody of another person, the destruction of the duplicate in the testator's possession revokes the whole. *Seymour's Case*, Com. Rep. 453; 1 P. W. 346; 2 Vern. 742; *Onions v. Tyrer*, 1 P. W. 346; *Burtenshaw v. Gilbert*, Cowp. 49; *Boughey v. Moreton*, 2 Cas. t. Lee, 532; 3 Hag. 191; *Rickards v. Mumford*, 2 Phillim. 23; *Colvin v. Fraser*, 2 Hag. 266; see *Payne v. Trappes*, 1 Rob. 583.

The same result follows if the duplicate in the testator's possession cannot be found at his death. *Jones v. Harding*, 58 L. T. 60.

Will not
found.

A will or codicil left in the testator's possession and not forthcoming at his death must, in the absence of evidence to the contrary, be presumed to have been revoked. *Padmore v. Whatton*, 3 Sw. & T. 449; *In bonis Shaw*, 1 Sw. & T. 62; *Brown v. Brown*, 8 E. & B. 876; *Eckersley v. Platt*, 1 P. & D. 281; *Sugden v. Lord St. Leonards*, 1 P. D. 154.

But the contents of the will and the declarations of the testator down to his death are admissible in evidence for the purposes of rebutting this presumption. *Patten v. Poulten*, 6 W. R. 458; 1 Sw. & T. 55; *Battyl v. Lyles*, 4 Jur. N. S. 718; *Finch v. Finch*, 1 P. & D. 371; *Whiteley v. King*, 17 C. B. N. S. 756; *Keen v. Keen*, 3 P. & D. 105; *Sugden v. Lord St. Leonards*, 1 P. D. 154.

Evidence of

Where a will, shown not to have been revoked, cannot be

found at the testator's death, or has been lost or destroyed after his death but before probate, evidence is admissible to prove its contents. *Brown v. Brown*, 8 E. & B. 876; *In bonis Barber*, 1 P. & D. 267; *Burls v. Burls*, *ib.* 472; *In bonis Leigh*, (1892) P. 82. Chap. VI.
contents of
lost will.

And for this purpose the declarations, written or oral, of the testator, made before the execution of the will, may be admitted. *Doe d. Shalcross v. Palmer*, 16 Q. B. 747; *Quick v. Quick*, 3 Sw. & T. 442; *Johnson v. Lyford*, 1 P. & D. 546; *Sugden v. Lord St. Leonards*, 1 P. D. 154.

It is doubtful whether they may be admitted if made after the execution of the will. *Woodward v. Goulstone*, 11 App. C. 469.

The contents of the will may be established by the evidence of a single interested witness whose veracity and competency are unimpeached. *Sugden v. Lord St. Leonards*, 1 P. D. 154; see *Flood v. Russell*, 29 L. R. Ir. 91.

Where it is impossible to ascertain the whole contents of the will, effect will be given to such portions as can be ascertained, if the court is satisfied that they substantially represent the intention of the testator. *Sugden v. Lord St. Leonards*, 1 P. D. 154; *Dickinson v. Stidolph*, 11 C. B. N. S. 341; *Woodward v. Goulstone*, 11 App. C. 469.

CHAPTER VII.

WILLS OF SOLDIERS AND SEAMEN.

- Chap. VII.** THE Statute of Frauds (29 Car. II. c. 3), sect. 23, provides that, notwithstanding that Act, any soldier being in actual military service, or any mariner or seaman being at sea, may dispose of his movables, wages, and personal estate as he or they might have done before the making of the Act.
- Soldiers and sailors excepted from Statute of Frauds as regards wills of movables.** The Wills Act (1 Vict. c. 26), sect. 11, enacts that any soldier being in actual military service, or any mariner or seaman being at sea, may dispose of his personal estate as he might have done before the making of the Act.
- Exception continued by Wills Act.** By the Navy and Marines (Wills) Act, 1865 (28 & 29 Vict. c. 72), it is provided :—
- The Navy and Marines (Wills) Act, 1865.** 2. In this Act—
- Interpretation of terms.** The term “seaman or marine” means a petty officer or seaman, non-commissioned officer of marines or marine, or other person forming part in any capacity of the complement of any of Her Majesty’s vessels, or otherwise belonging to Her Majesty’s naval or marine force, exclusive of commissioned, warrant, and subordinate officers, and assistant engineers, and of kroomen.
- Will made before entry ineffectual as to wages, &c.** 3. A will made after the commencement of this act by any person at any time previously to his entering into service as a seaman or marine shall not be valid to pass any wages, prize money, bounty money, grant, or other allowance in the nature thereof, or other money payable by the Admiralty, or any effects or money in charge of the Admiralty.
- Will invalid if combined with power of attorney.** 4. A will made after the commencement of this Act by any person while serving as a seaman or marine shall not be valid

for any purpose if it is written or contained on or in the same paper, parchment, or instrument with a power of attorney. Chap. VII.

5. A will made after the commencement of this Act by any person while serving as a seaman or marine, or when he has ceased so to serve, shall not be valid to pass any wages, prize money, bounty money, grant, or other allowance in the nature thereof, or other money payable by the Admiralty, or any effects or money in charge of the Admiralty, unless it is made in conformity with the following provisions :—

*Regulations
for wills of
seamen, &c.,
as to wages,
&c.*

- (1.) Every such will shall be in writing and be executed with the formalities required by the law of England in the case of persons not being soldiers in actual military service or mariners or seamen at sea :
- (2.) Where the will is made on board one of Her Majesty's ships, one of the two requisite attesting witnesses shall be a commissioned officer, chaplain, or warrant or subordinate officer belonging to Her Majesty's naval or marine or military force :
- (3.) Where the will is made elsewhere than on board one of Her Majesty's ships, one of the two requisite attesting witnesses shall be such a commissioned officer or chaplain or warrant or subordinate officer as aforesaid, or the governor, agent, physician, surgeon, assistant surgeon, or chaplain of a naval hospital at home or abroad, or a justice of the peace, or the incumbent, curate, or minister of a church or place of worship in the parish where the will is executed, or a British consular officer, or an officer of customs, or a notary public :

A will made in conformity with the foregoing provisions shall, as regards such wages, money, or effects, be deemed to be well made for the purpose of being admitted to probate in England ; and the person taking out representation to the testator under such will shall exclusively be deemed the testator's representative with respect to such wages, money, or effects.

6. Notwithstanding anything in this or any other Act, a will made after the commencement of this Act by a seaman or

*As to wills
made by
prisoners of
war.*

Chap. VII.

marine while he is a prisoner of war, shall (as far as regards the form thereof) be valid for all purposes if it is made in conformity with the following provisions :—

- (1.) If it is in writing and is signed by him, and his signature thereto is made or acknowledged by him in the presence of and is in his presence attested by one witness, being either a commissioned officer or chaplain belonging to Her Majesty's naval or marine or military force, or a warrant or subordinate officer of Her Majesty's navy, or the agent of a naval hospital, or a notary public :
- (2.) If the will is made according to the forms required by the law of the place where it is made :
- (3.) If the will is in writing and executed with the formalities required by the law of England in the case of persons not being soldiers in actual military service or mariners or seamen at sea.

Payment
under will
not in con-
formity with
Act.

7. Notwithstanding anything in this Act, in case of a will made after the commencement of this Act by any person while serving as a marine or seaman, and being either in actual military service or a mariner or seaman at sea, the Admiralty may pay or deliver any wages, prize money, bounty money, grant, or other allowance in the nature thereof, or other money payable by the Admiralty, or any effects or money in charge of the Admiralty, to any person claiming to be entitled thereto under such will, though not made in conformity with the provisions of this Act, if, having regard to the special circumstances of the death of the testator, the Admiralty are of opinion that compliance with the requirements of this Act may be properly dispensed with.

Commence-
ment of Act.

8. This Act shall commence on such day, not later than the first day of January, one thousand eight hundred and sixty-six, as Her Majesty in Council thinks fit to direct ; nevertheless Her Majesty in Council may, if it seems fit, with reference to any places out of the United Kingdom, direct that this Act do not commence there, respectively, until a time after that day, and with respect to every such place the time so appointed shall be deemed the time of commencement of this Act.

9. Every Order in Council under this Act shall be published in the *London Gazette*, and shall be laid before both Houses of Parliament within thirty days after the making thereof, if Parliament is then sitting, and if not, then within thirty days after the next meeting of Parliament.

Chap. VII.

Publication
of Orders in
Council.

It follows, therefore, that except in the cases mentioned in the *Navy and Marines (Wills) Act, 1865*, any soldier in actual military service, and any mariner or seaman being at sea, can make a testamentary disposition of his personalty in the manner allowed before the *Statute of Frauds*.

It is not proposed here to go into a full discussion of the old law. It may, however, be useful shortly to state some of the more important points relating to the wills of these privileged persons.

Such privileged persons may make wills disposing of their personal property, provided they have attained the age of fourteen. *In bonis Farquhar*, 4 N. of C. 651; *In bonis McMurdo*, 1 P. & D. 540; *Swinburne*, part ii., sect. 2, p. 75.

Infancy.

The term "soldier" in sect. 11 of the *Wills Act*, includes an officer and a surgeon. *Drummond v. Parish*, 3 Curt. 522; *In bonis Hayes*, 2 Curt. 338; *In bonis Donaldson*, 2 Curt. 386.

Soldier
defined.

The words "on actual military service" are equivalent to "on an expedition."

Military
service.

Thus a will made by an officer while quartered at home or abroad in barracks is not within this section. *Drummond v. Parish*, 3 Curt. 522; *White v. Repton*, 3 ib. 818; *In bonis Phipps*, 2 ib. 368; *In bonis Johnson*, ib. 341; *In bonis Hill*, 1 Rob. 276; *Herbert v. Herbert*, D. & Sw. 10; see *In bonis Donaldson*, 2 Curt. 386.

The term "mariner or seaman" includes a purser and a surgeon, and it seems the whole profession. *In bonis Hayes*, 2 Curt. 338; *In bonis Saunders*, 1 P. & D. 16; *In bonis Rae*, 27 L. R. Ir. 116.

Mariner
defined.

It also includes persons serving in the merchant service. *In bonis Milligan*, 2 Rob. 108; *Morrell v. Morrell*, 1 Hag. 51; *In bonis Parker*, 2 Sw. & T. 375.

The term "at sea" appears to be equivalent to "on maritime service," including the period while the testator is returning

"At sea."

Chap. VII.

from such service. Thus wills made on board a vessel in a river, or in port, have been held valid within sect. 11. *In bonis Austen*, 2 Rob. 611; *In bonis Corby*, 18 Jur. 634; *In bonis Lay*, 2 Curt. 375; *Seymour's Case*, cit. 3 Curt. 530; *In bonis Saunders*, 1 P. & D. 16; *In bonis McMurdo*, *ib.* 540; *In bonis Rae*, 27 L. R. Ir. 116.

Nuncupative
wills.

The privileged persons above mentioned may make nuncupative wills, which will remain operative, though at the time of their death they may not be on service, or at sea. *Morrell v. Morrell*, 1 Hag. 51; *In bonis Leese*, 17 Jur. 216; see, too, *Leman v. Bonsall*, 1 Add. 389.

They may make a will by any testamentary paper, whether in their handwriting or not, and whether signed by them or not, provided it can be shown that such paper was intended to take effect as the testator's last will. *Friswell v. Moore*, 3 Phillim. 135; *Constable v. Steibel*, 1 Hag. 56; *MacLae v. Ewing*, 1 Hag. 317; *Reud v. Phillips*, 2 Phillim. 122; *Mas-terman v. Maberly*, 2 Hag. 235. See *Rymer v. Clarkson*, 1 Phillim. 22; *In bonis Cosser*, 1 Rob. 633; *Fulleck v. Atkin-son*, 3 Hag. 527; *Wood v. Medley*, 1 Hag. 661; *In bonis Rae*, 27 L. R. Ir. 116.

The following rules must be understood as relating only to wills of personalty not within the Statute of Frauds or the Wills Act.

Proof of hand-
writing.

A will not found in the testator's possession cannot be established merely on proof of the testator's handwriting. *Machin v. Grindell*, 2 Lee, 406; *Jameson v. Cooke*, 1 Hag. 82; *Crisp v. Walpole*, 2 Hag. 531; *Rutherford v. Maule*, 4 Hag. 213; *Bussell v. Marriott*, 1 Curt. 9; *Wood v. Goodlake*, 2 Curt. 82, 176; 2 Moo. P. C. 354, 436.

Will with
attestation
clause, but
not attested.

A will bearing an execution or attestation clause, but unexecuted or unattested, will be presumed not to have been finally adopted as the will of the testator. *Scott v. Rhodes*, 1 Phillim. 19; *Abbott v. Peters*, 4 Hag. 380; *Beaty v. Beaty*, 1 Add. 154; *Montefiore v. Montefiore*, 2 Add. 357; *Stewart v. Stewart*, 2 Moo. P. C. 193; *Bragg v. Dyer*, 3 Hag. 207.

Such presumption may be rebutted, if sufficient grounds can be shown for the omission to execute or attest it, such as ill-

health, or unavoidable accident, or if it appears that it was intended to take effect as the testator's will in the form in which it is found. *In bonis Taylor*, 1 Hag. 641; *L'Huille v. Wood*, 2 Cas. t. Lee, 22; *Lamkin v. Babb*, 1 Cas. t. Lee, 1; *Scott v. Rhodes*, 1 Phillim. 12; *Masterman v. Maberly*, 2 Hag. 247; *Hoby v. Hoby*, 1 Hag. 146; *Forbes v. Gordon*, 3 Phillim. 614; *Thomas v. Wall*, 3 Phillim. 23; *In bonis Lamb*, 4 N. of C. 561; *Buckle v. Buckle*, 3 Phillim. 323; *Allen v. Manning*, 2 Add. 490; *Harris v. Bedford*, 2 Phillim. 177.

Where the will includes property which can only be given by a will executed with certain formalities, the same presumption arises that the will was intended to be executed with such formalities. *In bonis Herne*, 1 Hag. 222, 226; *Douglas v. Smith*, 3 Knapp, 1; *Elsden v. Elsden*, 4 Hag. 183; *Gillow v. Burne*, 4 Hag. 291; *Reynolds v. White*, 2 Lee, 214; *Reeves v. Glover*, 2 Lee, 359.

It seems if the will includes realty, and the gift of the personalty is made dependent on the gift of the realty, probate of the will as regards the personalty would be refused as well. *Tudor v. Tudor*, 4 Hag. 199, n.

A paper intended to be effectual, pending the preparation of a more formal document, will take effect as a will, if no formal document is executed. *Popple v. Cunison*, 1 Add. 377; *Forbes v. Gordon*, 3 Phillim. 614; *Hattatt v. Hattatt*, 4 Hag. 211.

Instructions for a will may take effect as a will, if the testator was prevented by death from executing a formal will. *Bone v. Spear*, 1 Phillim. 345; *Green v. Skipworth*, *ib.* 53; *Wood v. Wood*, *ib.* 357; *Huntington v. Huntington*, 2 *ib.* 213; *Sikes v. Snaith*, *ib.* 351; *Must v. Sutcliffe*, 3 *ib.* 104; *Nathan v. Morse*, *ib.* 529; *Lewis v. Lewis*, *ib.* 109; *Allen v. Manning*, 2 Add. 490; *Goodman v. Goodman*, 2 Lee, 109; *Robinson v. Chamberlayne*, *ib.* 129; *Brown v. Farrant*, *ib.* 418; *Burrows v. Burrows*, 1 Hag. 109.

Where an interval intervenes between the preparation of instructions for a will and the death of the testator, the instructions will take effect as a will only upon evidence that the testator adhered to them down to his death. *Bone v. Spear*,

Chap. VII.

1 Phillim. 345 ; *Devereux v. Bullock*, *ib.* 60, 72 ; *Sandford v. Vaughan*, *ib.* 48 ; *In bonis Herne*, 1 Hag. 222 ; *Barwick v. Mullings*, 2 Hag. 225 ; *Mitchell v. Mitchell*, *ib.* 74 ; *Dingle v. Dingle*, 4 *ib.* 388 ; *Reay v. Cowcher*, 2 *ib.* 249 ; *Antrobus v. Nepean*, 1 Add. 399 ; *Monroe v. Coutts*, 1 Dow. 437 ; *Matthews v. Warner*, 4 Ves. 186 ; *Torre v. Castle*, 2 Moo. P. C. 133.

Partial disposition.

An unexecuted paper, containing only a partial disposition of the testator's property will not take effect as a will, unless it be shown to contain the final intention of the testator as far as it goes. *Montefiore v. Montefiore*, 2 Add. 354 ; *Cundy v. Medley*, 1 Hag. 140 ; *Maclae v. Ewing*, *ib.* 317 ; *In bonis Wenlock*, *ib.* 551 ; *In bonis Robinson*, *ib.* 643 ; *Devereux v. Bullock*, 1 Phillim. 60 ; *Sandford v. Vaughan*, *ib.* 48 ; *Theakston v. Marson*, 4 Hag. 290 ; *Bayle v. Mayne*, 3 Phillim. 504.

Alterations.

Alterations in the will of a soldier, which was made while on actual military service, will be presumed to have been made during the continuance of such service. *In bonis Tweedale*, 3 P. & D. 204.

Charge of legacies on realty.

A charge of legacies on real estate contained in a will duly executed to affect realty will include legacies given by a subsequent unattested will when the testator is one of the persons competent to dispose of his personalty by such will. *Buckeridge v. Ingram*, 2 Ves. Jun. 652 ; *Sheddon v. Godrich*, 8 Ves. 481 ; *Wilkinson v. Adam*, 1 V. & B. 445 ; *Swift v. Nash*, 2 Kee. 20 ; see *Rose v. Cunynghame*, 12 Ves. 29.

Legacies charged upon real estate as an auxiliary fund may be revoked by a subsequent valid will, though not executed so as to affect realty. *Brudenell v. Boughton*, 2 Atk. 268 ; *A.-G. v. Ward*, 3 Ves. 327.

Legacies charged only upon real estate cannot be revoked by a subsequent valid will not executed so as to affect realty. *Beckett v. Harden*, 4 Mau. & S. 1 ; *Locke v. James*, 11 M. & W. 901 ; see *Mortimer v. West*, 2 Sim. 274 ; *Fitzgerald v. Field*, 1 Russ. 428.

Legacies given out of a mixed fund of realty and personalty can be revoked by a valid will not executed to affect realty only so far as they are payable out of the personalty. *Stocker v. Harbin*, 3 B. 479.

A valid will of personalty not executed to affect realty may dispose of any portion of the personalty free from legacies, though the effect may be to increase a charge of legacies on realty contained in a prior will effectually disposing of real estate. *Coze v. Bassett*, 3 Ves. 155.

The marriage of a privileged testator or the birth of a child subsequent to the date of the will will not alone revoke the will. *Doe v. Barford*, 4 M. & S. 10; *Wellington v. Wellington*, 4 Burr. 2171; *Wells v. Wilson*, 5 T. R. 52, note; *Jackson v. Hurlock*, Amb. 495.

Revocation
by marriage
and birth of
children.

But the birth of children alone after the date of the will affords a presumption against the will. *Johnston v. Johnston*, 1 Phillim. 447.

A privileged will is revoked by the subsequent marriage of the testator and the birth of children, unless the wife and children are provided for by the will or by a previous settlement. *Overbury v. Overbury*, 2 Stow. 242; see 1 Phillim. 479; *Kenebel v. Scrafton*, 2 East, 530; *Doe v. Lancashire*, 5 T. R. 49 (posthumous child).

The same rule applies to the case of a widower who marries a second time and has children, though the will may be in favour of children by the first marriage. *Christopher v. Christopher*, Dick. 445; *Holloway v. Clarke*, 1 Phillim. 339; *Walker v. Walker*, 2 Curt. 854.

Marriage of
widower.

It appears to be unsettled whether the birth of children by a first wife after the date of the will and marriage to a second wife revokes the will. *Gibbons v. Caunt*, 4 Ves. 848.

The will is not revoked where it does not dispose of all the testator's estate. See *Kenebel v. Scrafton*, 2 East, 541; *Marston v. Roe d. Fox*, 8 Ad. & E. 57; *Brady v. Cubitt*, Dougl. 40; *Doe d. Shelley v. Edlin*, 4 A. & E. 587.

Provision made for the wife alone by a settlement or by the will itself will not prevent its revocation. *Marston v. Roe d. Fox*, 8 A. & E. 14; 2 Nev. & P. 504.

Provision for
wife.

Provision by a settlement subsequent to the will will not prevent revocation. *Israell v. Rodon*, 2 Moo. P. C. 51; see *Talbot v. Talbot*, 1 Hag. 705; *Ex parte Ilchester*, 7 Ves. 348; *Johnson v. Wells*, 2 Hag. 561; *In bonis Cadywold*, 1 Sw. & T. 34.

Chap. VII.

The will is not revoked where such revocation would not benefit the afterborn children. *Sheath v. York*, 1 V. & B. 390.

The fact that the wife and children predecease the testator will not revive the revoked will. *Helyar v. Helyar*, 1 Phillim. 413; *Sullivan v. Sullivan*, *ib.* 343; *Emerson v. Boville*, *ib.* 342; overruling *Wright v. Netherwood*, 2 Salk. 539, n.; 2 Phillim. 266, n.

In the case of privileged wills it seems clear that a will, though revoked by marriage and birth of children, may be set up again by evidence of intention to adhere to it, such wills being free from the operation of the Statute of Frauds and Wills Act. See *Marston v. Roe d. Fox*, 8 A. & E. 14; *Gibbens v. Cross*, 2 Add. 455; *Fox v. Marston*, 1 Curt. 494; *Israell v. Rodon*, 2 Moo. P. C. 51; *Matson v. Magrath*, 1 Rob. 680; *Tapster v. Holtzappfel*, 5 N. of C. 554.

CHAPTER VIII.

REVIVAL—REPUBLICATION—INCORPORATION—
SECRET TRUSTS.A. *Revival of Wills.*

THE Wills Act (1 Vict. c. 26), sect. 22, enacts, that no will or codicil, or any part thereof which shall be in any manner revoked, shall be revived, otherwise than by the re-execution thereof, or by a codicil executed in manner thereinbefore required, and showing an intention to revive the same; and when any will or codicil which shall be partly revoked and afterwards wholly revoked shall be revived, such revival shall not extend to so much thereof as shall have been revoked before the revocation of the whole thereof, unless an intention to the contrary shall be shown.

Chap. VIII.

No will re-
voked to be
revived other-
wise than by
re-execution,
or a codicil
to revive it.

Where a testamentary disposition is revoked by a subsequent disposition, which latter is in its turn revoked, the former disposition is not thereby revived. *Burtenshaw v. Gilbert*, Cowp. 49; *In bonis Brown*, 1 Sw. & T. 32; *Brown v. Brown*, 8 E. & B. 876; *Wood v. Wood*, 1 P. & D. 309; see *M'Ara v. M'Cay*, 23 L. R. Ir. 138.

Revocation
of revoking
will.

Where the testator by his will gave all his property to A. and by a second will gave his real estate to B. and then revoked the second will, it was held that the first will took effect only on the personalty. *In bonis Hodgkinson*, (1893) P. 339.

It has been doubted whether since the Wills Act a codicil, described as a codicil to a will of a particular date which has been revoked, would be sufficient to revive the revoked will in

Revival by
codicil.

Chap. VIII.

the absence of any additional evidence of "intention to revive the same." *In bonis Steele*, 1 P. & D. 575; see *In bonis Lindsay*, 8 Times L. R. 507.

There is an obvious distinction between a codicil incorporating and giving effect to earlier unattested instruments, for which purpose a mere reference is sufficient, and a codicil reviving a revoked instrument.

There are, however, cases in which a codicil described as a codicil to a particular will which has been revoked by marriage, there being no other will in existence, has been held sufficient to revive the revoked will. *In bonis Chapman*, 1 Rob. 1; *Payne v. Trappes*, 1 Rob. 583.

This was clearly the rule before the Wills Act. *Lord Walpole v. Earl of Orford*, 3 Ves. 402; S. C. 7 T. R. 138.

In the case of *Neate v. Pickard*, 2 N. of C. 406, and in *In bonis Reynolds*, 3 P. & D. 35, there appear to have been express words of confirmation; see too *McLeod v. McNab*, (1891) A. C. 471, P. C.

Contingent
codicil.

It seems a codicil, described as a codicil to a will of a particular date, though the codicil is directed to take effect only in events which do not happen, may have the effect of reviving the will. *In bonis Da Silva*, 2 Sw. & T. 315; see *Parsons v. Lanoe*, 1 Ves. Sen. 190.

Codicil re-
ferring to will
revoked by
later will.

If there are two wills, the later of which revokes the earlier, it seems a codicil described as a codicil to the testator's last will, but giving the date of the revoked will, will not revive that will or revoke the second will. *In bonis May*, 1 P. & D. 581; *In bonis Ince*, 2 P. & D. 111. These cases may very well be supported on the ground that the description of the will by the codicil was ambiguous, the will of the date mentioned not being the last will of the testator, or, in fact, his will at all, as it had been revoked. See *In bonis Edge*, 9 L. R. Ir. 516.

In *In bonis Anderson*, 39 L. J. P. 55, the principle applied was the same. In that case the codicil was expressed to be a codicil to the testator's last will, but confirmed a will by date which had been revoked.

In *In bonis Wilson*, 1 P. & D. 582, the codicil though referring to a revoked will by date, went on to refer to certain

bequests as contained in that will, which were, in fact, contained in a later will. There was, therefore, a clear case of mistaken description.

Chap. VIII.

If the codicil not only refers to the revoked will by date but also refers to the provisions of the revoked will, probate will be granted of the revoked will, the subsequent will and the codicil together. *In bonis Stedham*; *In bonis Dyke*, 6 P. D. 205.

Where a will was revoked by a subsequent will, a codicil described as a codicil to the testator's last will, and confirming certain dispositions contained in the revoked will, had the effect of reviving the revoked will. *In bonis Van Cutsem*, 63 L. T. 252.

Where a codicil merely refers by recital to a revoked will, the revoked will is not revived. *In bonis Dennis*, (1891) P. 326.

A testamentary disposition, written at the foot of a will revoked by marriage, and referring to a bequest contained in the will, though not referring to the will in terms or described as a codicil, is sufficient to revive the will. *In bonis Terrible*, 2 Sw. & T. 8.

Writing on the will referring to its contents.

The fact that a codicil is found attached by tape to a will which has been revoked by a later will will not revive the revoked will. *Marsh v. Marsh*, 1 Sw. & T. 528.

Codicil attached to revoked will.

A will which has been destroyed and no longer exists in writing cannot be revived by a codicil, though there may be a draft of the will in existence. *Hale v. Tokelove*, 2 Rob. 318; *Newton v. Newton*, 12 Ir. Ch. 118; *Rogers v. Goodenough*, 2 Sw. & T. 342.

Destroyed will.

A codicil which refers to a will by date and makes certain alterations in it and then confirms the will, does not revive so much of the will as has been altered by intermediate codicils. *Crosbie v. MacDoual*, 4 Ves. 610; *Green v. Tribe*, 9 Ch. D. 231.

Codicil confirming will altered by earlier codicil.

But a second codicil confirming the will and reciting and treating as unrevoked certain dispositions of the will which have in fact been revoked by a first codicil, revives the will without the alterations made by the first codicil. *McLeod v. McNab*, (1891) A. C. 471, P. C.

Where a testator had by a third codicil revoked the first and

Chap. VIII.

second codicils, and by a fourth codicil confirmed his will and former codicils, it was held that, as the fourth codicil confirmed the third, the first and second remained revoked. *In bonis Carritt*, 66 L. T. 379.

B. *Republication.*

Republication
of earlier
testamentary
instrument.

A distinction must be made between revival of a revoked testamentary instrument and republication of a valid testamentary instrument in such a way as to make it operate as at the date of republication.

It is clear that any reference which would be sufficient to revive a revoked instrument would be sufficient to republish an earlier unrevoked instrument. But a reference, sufficient to republish, would not necessarily revive a revoked instrument.

Thus a codicil described as a codicil to a will republishes the will though is may not be sufficient to revive the will if revoked. *Acherley v. Vernon*, 3 B. P. C. 107; *Barnes v. Crowe*, 1 Ves. J. 486; *Skinner v. Ogle*, 5 N. of C. 74; 1 Rob. 363; *Rowley v. Eyton*, 2 Mer. 128 as corrected in 45 Ch. D. 637.

Again, a testamentary instrument not described as a codicil but written at the foot of the will and containing a reference to the executors named in the will republishes the will. *Serocold v. Heming*, 2 Lee, Eccl. 490.

But a will is not republished by a testamentary instrument not described as a codicil and not containing any reference to the will. *In re Smith*; *Bilke v. Roper*, 45 Ch. D. 632.

A codicil referring to a will of a particular date does not republish an intermediate codicil. *Burton v. Newbery*, 1 Ch. D. 234.

C. *Incorporation of Documents.*

Incorporation
of documents.

Any document in existence when the will is executed, and sufficiently described to enable it to be identified, may be incorporated with the will, and may be referred to for purposes of construction, whether incorporated in the probate or not. *Hutchings v. Wood*, 2 Moo. P. C. 355; *Aaron v. Aaron*, 3 De G. & S. 475; *In bonis Sunderland*, 1 P. & D. 198; *In bonis*

Mercer, 2 P. & D. 91; *In bonis Daniell*, 8 P. D. 14; see *In bonis Pascall*, 1 P. & D. 606; *In bonis Gill*, 2 P. & D. 6; *Quihampton v. Going*, 24 W. R. 917; *In bonis Garnett*, (1894) P. 90. Chap. VIII.

It has been said that the document must not only be in fact in existence when the will is executed, but also that it must be described as existing. *Van Straubenzee v. Monk*, 3 Sw. & T. 6; *In bonis Watkins*, 1 P. & D. 19; *In bonis Dallow*, *ib.* 189; *In bonis Sunderland*, *ib.* 198; *In re Kehoe*, 13 L. R. Ir. 13. Whether document must be described as existing.

It would seem, however, that if the document is proved to have been in existence at the date of the will, and is sufficiently identified by the description in the will, it is not necessary that it should be actually described as existing. See *Singleton v. Tomlinson*, 3 App. C. 404; *In re Coyte*; *Coyte v. Coyte*, 56 L. T. 510.

It seems that a document sufficiently referred to in the will, though not in existence, may be incorporated if it exists at the date of a codicil to the will. *In bonis Hunt*, 2 Rob. 622; *In bonis Stewart*, 32 L. J. P. 94; 3 Sw. & T. 192; 4 Sw. & T. 211; *In bonis Lady Truro*, 1 P. & D. 201, not following *In bonis Mathias*, 32 L. J. P. 115; 3 Sw. & T. 100. Incorporation of documents in existence at date of codicil.

But for this purpose it must be clear that the will, if read as of the date of the codicil, refers to a definite instrument, and that the instrument in question satisfies the description in the will. *Durham v. Northen*, (1895) P. 66.

Thus, a codicil confirming a will, which directs certain property to be distributed as the testator may by any memorandum or deed direct, will not have the effect of incorporating memoranda executed between the dates of the will and codicil. *In bonis Lancaster*, 29 L. J. P. 155; see *In bonis Warner*, 10 W. R. 566; *In bonis MacGregor*, 60 L. T. 840.

A memorandum not described as a codicil written on the back or the fourth side of a paper containing an invalid will to which it does not refer does not incorporate the will. *In bonis Drummond*, 2 Sw. & T. 8; *In bonis Tovey*, 47 L. J. P. 63; see *In bonis Willmott*, 1 Sw. & T. 36. Memorandum on back of will.

So a reference to executors "hereunder named," or the words

Chap. VIII. "turn over," will not incorporate a clause not contained in the body of the will, though written before execution. *In bonis Dallow*, 1 P. & D. 189; *In bonis Dearle*, 39 L. T. N. S. 93; see *In bonis Watkins*, 1 P. & D. 19.

On the other hand, the words "see over," with an asterisk, have been held sufficient to incorporate a sentence on the second side of a sheet of paper, by the side of which was also written "see over," with an asterisk. *In bonis Birt*, 2 P. & D. 214. See *In bonis Greenwood*, (1892) P. 7.

The cases above cited on the subject of revival are also authorities on the subject of incorporation.

Memorandum
referring to
contents of
will.

Thus it would seem that a memorandum at the foot of a will, referring to something contained in the will, would incorporate it, though there is no express reference to the will as such. *In bonis Terrible*, 2 Sw. & T. 8; *In bonis Widdrington*, 35 L. J. P. 66; see *Gardiner v. Courthope*, 12 P. D. 14.

Upon similar principles it has been held that a testamentary disposition not described as a codicil, but written on the back of the will underneath two codicils described as codicils to the will, and altering a provision contained in the second codicil, had the effect of republishing the will and codicils. *Guest v. Willasey*, 2 Bing. 429; 3 Bing. 614.

Reference to
a will in a
codicil incor-
porates an
unattested
will.

A reference by a duly attested codicil to a will incorporates the will, if the reference is such as to show that the testator intended to incorporate it, and if there is only one document in existence to which the term "will" can apply. *Barnes v. Crowe*, 1 Ves. Jun. 485; *Doe d. Williams v. Evans*, 1 Cr. & Mee. 42; *Allen v. Maddock*, 11 Moo. P. C. 427; *In bonis Heathcote*, 6 P. D. 31.

Reference to
unattested
codicil.

Similarly, a reference in a codicil to a prior unattested codicil will incorporate it. *Ingoldby v. Ingoldby*, 4 N. of C. 493; *Smith's Case*, 2 Curt. 796.

Reference to
will where
there are a
valid will
and codicils.

A reference, however, in a codicil to a will and prior codicils, where there are a will and codicils duly attested, will not incorporate a codicil not duly attested. *Croker v. Marquis of Hertford*, 3 Curt. 468; 4 Moo. P. C. 339.

Reference to
will where

And upon the same principle it would seem that a reference by a codicil to a will, where there are a duly attested will and

some unattested codicils, will not set up the unattested codicils. **Chap. VIII.**
Utterton v. Robins, 1 Ad. & E. 423; 2 Nev. & M. 821; *In bonis Phelps*, 6 N. of C. 695; *Haynes v. Hill*, 7 N. of C. 256; see, however, *Radburn v. Jervis*, 3 B. 450; *Guest v. Willasey*, 2 Bing. 429; 3 Bing. 614.

there are a valid will and unattested codicils.

Possibly a reference to a will in general terms would incorporate all the valid instruments constituting the will, such as a will and several codicils.

Will may include will and codicils.

A codicil referring to a will by date incorporates the will of that date only, and not subsequent codicils. *Burton v. Newbery*, 1 Ch. D. 434; *In bonis Reynolds*, 3 P. & D. 35.

Reference to will by date.

The case is not altered by the fact that a valid codicil referring to the will by date is written on the same paper as a valid will and an intermediate unattested codicil. *In bonis Hutton*, 5 N. of C. 598; *In bonis Phelps*, 6 *ib.* 695; *In bonis Willmott*, 1 Sw. & T. 36; *In re Spotten*, 5 L. R. Ir. 403.

Perhaps where a codicil is directed to be taken as part of the will, a subsequent codicil referring to the will by date and confirming it will have the effect of confirming the codicil as well. See *Gordon v. Lord Reay*, 5 Sim. 274, disapproved in *Burton v. Newbery*, *supra*.

If the codicil recites the will by date and a codicil by date, and then confirms the "said will," the term "will" may include both will and codicil. *Aaron v. Aaron*, 3 De G. & S. 475.

As to whether a codicil headed "This is a fourth codicil to my will" would incorporate a codicil headed "This is a third codicil to my will," see *Stockil v. Punshon*, 6 P. D. 9.

Incorporation of an instrument into a will does not alter the effect of the instrument so far as it is already valid. So far as it is invalid as an independent instrument it takes effect as a testamentary disposition, subject to the ordinary rules as to lapse, ademption, &c., applicable to wills. *Bizzey v. Flight*, 3 Ch. D. 269.

Effect of incorporation.

A paper not in existence at the date of the execution of a testamentary instrument cannot be incorporated in it or referred to for purposes of construction. *Countess Ferraris v. Lord Hertford*, 3 Curt. 468; *In bonis Watkins*, 1 P. & D. 19; *In bonis Dallow*, *ib.* 189; *Singleton v. Tomlinson*, 3 App. C. 404;

Paper not in existence cannot be incorporated.

Chap. VIII.

Smith v. Conder, 9 Ch. D. 170 ; see *In bonis Keller*, 61 L. J. P. 39 ; 65 L. T. 768.

Power cannot be reserved by will of making a subsequent unattested will.

A testator cannot reserve by his will the power of making a testamentary disposition of his property by a subsequent unattested paper. *Habergham v. Vincent*, 2 Ves. Jun. 204 ; 4 B. C. C. 853 ; *Countess Ferraris v. Lord Hertford*, 3 Curt. 468 ; 4 Moo. P. C. 839.

Thus, a gift to trustees to hold upon the uses appointed by a letter to be signed by the testator is invalid. *Johnson v. Ball*, 5 De G. & S. 85.

Persons to take under a particular description may depend on a subsequent act of the testator.

But there is no objection to a gift to persons to be ascertained by a subsequent act on the part of the testator, provided the act is one which must be done as the natural result of the state of the property at the date of the will, and is in no way dependent upon a power reserved by the will. *Stubbs v. Sargon*, 2 Kee. 255 ; 3 M. & Cr. 507, where the gift was to the persons who should be in copartnership with the testatrix at the time of her decease, or to whom she should have disposed of her business.

Gift on trusts declared by parol to the trustee.

Where a gift is made by will to a person, and it appears on the face of the will that the gift is to be held on trust, but the trusts are not declared, oral evidence of the trusts is admissible if they have been communicated to the legatee prior to the execution of the will. *Crook v. Brooking*, 2 Vern. 50, 106 ; *Pring v. Pring*, 2 Vern. 98 ; *Irvine v. Sullivan*, 8 Eq. 673 ; *Riordan v. Banon*, I. R. 10 Eq. 469 ; *In re Fleetwood* ; *Sidgreaves v. Brewer*, 49 L. J. Ch. 514 ; 15 Ch. D. 594 ; see *Scott v. Brownrigg*, 9 L. R. Ir. 246 ; *In bonis Marchant*, (1893) P. 254, a curious case.

Gift on trust ; trust disclosed later.

It has been said that where the will discloses that a bequest is made to a person as a trustee, but the nature of the trusts is not disclosed, evidence of the trusts is admissible, if they have been communicated to the legatee after the execution of the will. See *Moss v. Cooper*, 1 J. & H. 852 ; *Riordan v. Banon*, I. R. 10 Eq. 469 ; *In re Fleetwood* ; *Sidgreaves v. Brewer*, 49 L. J. Ch. 514 ; 15 Ch. D. 594, where *Johnson v. Ball*, 5 D. G. & S. 85, which is an authority to the contrary, is discussed.

But if the trusts are contained in a letter not incorporated

with the will and not communicated to the trustees till after the testator's death, the trusts fail. *Scott v. Brownrigg*, 9 L. R. Ir. 246. Chap. VIII.

D. Secret Trusts.

The distinction between the class of cases where it appears on the face of the will that there is a trust and those mentioned below, where an absolute bequest is made upon a secret trust accepted by the legatee, though fine is real.

In the latter cases the legatee would be enabled to commit a fraud if evidence of the trust were not admitted. In the former cases he is a trustee upon the face of the will, and cannot therefore in any case take beneficially.

Where a gift is made in absolute terms, but the testator before or after the date of his will communicates to the legatees his intention that they are to hold the gift in trust, and they either accept the trust or acquiesce in it by silence, evidence of the trust is admissible. *Moss v. Cooper*, 1 J. & H. 352. Secret trust.

Such evidence is admissible, although the will states that the gift is not by way of trust. *Russell v. Jackson*, 10 Ha. 204; *Re Spencer's Will*, 57 L. T. 519; see *Pryor v. Pryor*, 2 D. J. & S. 205; *In re Crawshay*; *Crawshay v. Crawshay*, 43 Ch. D. 615.

The details of the trust must be disclosed to the trustees in the testator's lifetime, otherwise it cannot be enforced, and the devisee will take as trustee for the next of kin or heir. *In re Boyes*; *Boyes v. Carritt*, 26 Ch. D. 531.

Where a gift is made to A. and B. on the faith of a promise by A., given before the gift is made, to apply it to certain trusts, the trust is fastened on to the gift to both, though B. may not have been aware of the trust, on the principle that no one can take advantage of a gift procured by fraud. *Russell v. Jackson*, 10 Ha. 204. Gift procured by promise to hold it in trust.

Where a gift is made to A. and B. as tenants in common, the intention being to create a trust which is subsequently communicated to A. but not to B., the gift to A. only is fixed with the trust. *Tee v. Ferris*, 2 K. & J. 357; *Rowbotham v. Dunnnett*, 8 Ch. D. 430. Gift to persons who subsequently accept trust.

Chap. VIII.

If the gift is made to joint tenants, and the trust is subsequently disclosed to and accepted by one of them only, it seems the trust is fastened upon the whole gift. See *Jones v. Badley*, 3 Eq. 685; *Rowbotham v. Dunnnett*, 8 Ch. D. 480.

In cases of secret trust the intention to create a trust must be clearly established. *Jones v. Badley*, 3 Ch. 362; *McCormick v. Grogan*, L. R. 4 H. L. 82; *Re Downing's Residuary Estate*, 60 L. T. 140.

CHAPTER IX.

PROBATE AND ITS EFFECT.

EVERY instrument containing a testamentary disposition or affecting a prior testamentary disposition of personal property, is entitled to probate if properly executed and attested. *In bonis Durance*, 2 P. & D. 406. Chap. IX.
What may be proved.

A testamentary instrument appointing an executor is entitled to probate, though the executor renounces probate. *O'Dwyer v. Geare*, 1 Sw. & T. 465; 29 L. J. P. 47; *In bonis Lancaster*, 1 Sw. & T. 464; *In bonis Jordan*, 1 P. & D. 555. Instrument appointing executor.

A properly attested codicil is entitled to probate by itself, although it may by its language be dependent on an unattested will. *Gardiner v. Courthope*, 12 P. D. 14. Codicil.

A will to take effect upon a contingency is not admissible to probate for any purpose if the contingency does not happen, and is inoperative to revoke a previous will. *In bonis Hugo*, 2 P. D. 78. Contingent will.

But the principle does not apply to a codicil which will be admitted to probate, even if it is conditional and contains a declaration that it is not to be proved unless the condition is fulfilled, as it may have the effect of republishing the will. *In bonis Da Silva*, 2 Sw. & T. 315; *In bonis Colley*, 3 L. R. Ir. 243. Contingent codicil.

An instrument appointing guardians merely is not entitled to probate. *In bonis Morton*, 33 L. J. P. 87. Instrument appointing guardians.

Probate of the will of a married woman is now granted in the ordinary common form, whether she was married before or since the commencement of the Married Women's Property Act, 1882. See Probate Rules, March, 1887, cited *In re Lambert's*

Wills of married women.

Chap. IX. *Estate; Stanton v. Lambert*, 39 Ch. D. 626; *In re Jevers*, 13 L. R. Ir. 1; *In bonis Price*, 12 P. D. 137.

Effect of probate. The effect of such probate is to enable the executor to get in the assets, whether they pass under the will or not, but it does not affect the beneficial title. *In re Lambert's Estate; Stanton v. Lambert*, 39 Ch. D. 626; *Smart v. Tranter*, 43 Ch. D. 587.

Will of realty. A will disposing of real estate only, though the real estate may be directed to be converted and debts and legacies may be directed to be paid, is not entitled to probate. *In bonis Drummond*, 2 Sw. & T. 118; *In bonis Bootle*, 3 P. & D. 177.

For the purpose of probate the proceeds of sale of land sold under the Settled Estates Act and subject to re-investment in land is to be treated as realty. *In bonis Lloyd*, 9 P. D. 65.

But if the real estate disposed of is under another instrument held upon trust for sale so as to be converted in equity, the will is entitled to probate. *In bonis Gunn*, 9 P. D. 242.

Appointment of executor. A will disposing of realty only is entitled to probate if the testator appoints an executor. *In bonis Jordan*, 1 P. & D. 555; *In bonis Miskelly*, 1 R. 4 Eq. 62; *In bonis Cubbon*, 11 P. D. 169.

The will of a married woman disposing only of real estate belonging to her for her separate use and appointing an executor was, even before the Married Women's Property Act, 1882, entitled to probate. *Brownrigg v. Pike*, 7 P. D. 61; *In bonis Hornbuckle*, 15 P. D. 149.

Before the Married Women's Property Act, 1882, the will of a married woman made in pursuance of a power, and taking effect only upon real estate, was not entitled to probate where the married woman survived the coverture without republishing the will, though an executor might be appointed. *O'Dwyer v. Geare*, 1 Sw. & T. 465; *In bonis Barden*, 1 P. & D. 325; *In bonis Tomlinson*, 6 P. D. 209.

Foreign will. Where a testator makes two wills not referring to each other, one of property in England and the other of property abroad, and appoints different executors, the foreign will is not entitled to probate. *In bonis Cood*, 1 P. & D. 449; *In bonis Smart*, 32 W. R. 724.

As to the principle on which grants should be made of probate

of wills of persons domiciled abroad, see *In bonis Earl*, 1 P. & D. 450; *In bonis Briesemann*, (1894) P. 260. Chap. IX.

Where the testator made two wills, one of property vested in him as trustee, the other of his own property, the two wills were included in one probate. *In bonis Claus*, 31 W. R. 924.

If a will purports to be properly executed and attested, and there is no doubt that it is the testator's will, the Court will assume that it was properly executed and attested, though the evidence of the attesting witnesses as to the execution may not be satisfactory. This doctrine, of course, does not apply if the recollection of the attesting witnesses as to some defect in execution is clear. *Lloyd v. Roberts*, 12 Moo. P. C. 158; *Wright v. Sanderson*, 9 P. D. 149; *Woodhouse v. Balfour*, 13 P. D. 2; *Wyatt v. Berry*, (1893) P. 5; *Clery v. Barry*, 21 L. R. Ir. 152; *Glover v. Smith*, 57 L. T. 60; *Dayman v. Dayman*, 71 L. T. 699.

Perfect will
presumed
to be duly
executed.

In the absence of an attestation clause, or if the attestation clause does not state the performance of the necessary ceremonies, the will must be proved by an affidavit of one of the witnesses. *Bryan v. White*, 2 Rob. 315; *Belbin v. Skeats*, 1 Sw. & T. 148; *Bowman v. Hodgson*, 1 P. & D. 362; *In bonis Wilson*, 1 P. & D. 269.

Affidavit of
witness.

If no evidence is obtainable from the attesting witnesses, the will will be presumed to have been duly executed, even in the absence of an attestation clause. *Burgoyne v. Showler*, 1 Rob. 5; *In bonis Luffman*, 5 N. of C. 183; *In bonis Dickson*, 6 N. of C. 278; *Vinnicomb v. Butler*, 13 W. R. 392; *In bonis Nicks*, 34 L. J. P. 30; *In bonis Rees*, *ib.* 56; *Foot v. Stanton*, 1 Dea. 19; 2 Jur. N. S. 380; *In bonis Torre*, 8 Jur. N. S. 494; *In bonis Puddephatt*, 2 P. & D. 97; see *In bonis Jones*, 46 L. J. P. 80; *Clarke v. Clarke*, 5 L. R. Ir. 47; *Harris v. Knight*, 15 P. D. 170; *In bonis Malins*, 19 L. R. Ir. 231.

Attesting
witnesses
dead.

Declarations by a testator that he has duly executed his will are inadmissible as evidence of its due execution. *In bonis Ripley*, 1 Sw. & T. 68; see 1 P. D. 227.

Declarations
by testator.

A foreign probate will not affect personal property in England, but a duly authenticated copy of a will proved in a foreign country will be admitted to probate in England without further evidence of the validity of the will. *In bonis Smith*,

Foreign
probate.

Chap. IX. 16 W. R. 1130; *In bonis Earl*, 1 P. & D. 450; *In bonis Hill*, 2 P. & D. 89; *Miller v. James*, 3 P. & D. 5; *In bonis Rule*, 4 P. D. 76; see *In bonis Prince Henry the 69th*, 49 L. J. P. 67; *In bonis Dost Aly Khan*, 6 P. D. 6; *In re Vallance*, 48 L. T. 941.

Where the will has been proved abroad the codicils must also be proved abroad. *In bonis Miller*, 8 P. D. 167.

As to Scotch confirmations, see 21 & 22 Vict. c. 56, sects. 12, 16; *In bonis Ryde*, 2 P. & D. 86; *Hood v. Lord Barrington*, 6 Eq. 218; *In bonis Ewing*, 6 P. D. 19.

As to Irish probates, see 20 & 21 Vict. c. 79, sect. 95.

Probate of translation.

As to the power of the Court to look at a copy of a will in French when an English translation has been proved, see *In re Cliff's Trusts*, (1892) 2 Ch. 229.

Whether incorporated document should be included in probate.

The question whether documents not in themselves of a testamentary character but incorporated with the will should be included in the probate is mainly one of convenience.

If the document is valid in itself independently of the will, it would seem that it need not be included in the probate, if there is a difficulty in procuring its production. *Sheldon v. Sheldon*, 1 Rob. 81; *In bonis Sebthorp*, 1 P. & D. 106.

If the document derives its validity from the will it ought, as a general rule, to be included in the probate. *Sheldon v. Sheldon*, *supra*.

If the document incorporated with the will is itself testamentary it should be included in the probate.

Thus, where an English will refers to and incorporates a foreign will the foreign will must be included in the probate, though the executors of the English will may have nothing to do with the property disposed of by the foreign will. *In bonis Harris*, 2 P. & D. 83; *In bonis Lord Howden*, 43 L. J. P. 26; *In bonis Crawford*, 15 P. D. 212; *In bonis Lockhart*, 69 L. T. 21.

On the other hand, where the testator makes two independent wills, one disposing of property in England and the other of property in a foreign country, probate may be granted of the English will alone. *In bonis Astor*, 1 P. D. 150; *In bonis Bolton*, 12 P. D. 202; *In bonis Callaway*, 15 P. D. 147; *In bonis De La Rue*, 15 P. D. 185; *In bonis Seaman*, (1891) P.

253; *In bonis Fraser*, (1891) P. 285; *In bonis Tamplin*, (1894) P. 39. Chap. IX.

Where the deceased person makes no disposition of his English property, but leaves a will expressly confined to foreign property, administration of the English property will be granted as upon an intestacy. *In bonis Mann*, (1891) P. 293.

Where a clause of a revoked instrument is incorporated the clause alone will be included in the probate. *In bonis Kehoe*, 7 L. R. Ir. 343.

Probate of a will must be applied for in the Probate Division, and no proceedings can be taken under a will of personal property till the will has been proved, unless, perhaps, probate is alleged and admitted on the pleadings. *Pinney v. Hunt*, 6 Ch. D. 98; see *Tarn v. Commercial Bank of Sydney*, 12 Q. B. D. 294; *Priestman v. Thomas*, 9 P. D. 210; *Bradford v. Young*, 26 Ch. D. 656; see 29 Ch. D. 617; *In re Masonic and General Life Assurance Co.*, 32 Ch. D. 373. Where will must be proved.

By 20 & 21 Vict. c. 77, sect. 62, it is provided that where the will is proved in solemn form, or its validity declared in a contentious matter, the probate shall be conclusive evidence of the validity and contents of the will in all proceedings affecting real estate. Probate, how far evidence as to realty.

Sect. 64 provides in effect that if probate of a will not proved in solemn form is intended to be used in an action as evidence of a testamentary disposition affecting realty, ten days' notice before the trial of the intention to use the probate as evidence may be given; and if the opposite party does not within four days after receiving such notice, give notice that he disputes the validity of the will, the probate will be *prima facie* evidence of the will, its validity and contents. *Barraclough v. Greenhough*, L. R. 2 Q. B. 612.

Where the will has not been proved there can be no doubt that an action will lie in the Chancery Division to establish it, so far as it relates to real estate. For the old practice on this subject, see a valuable note in Mr. Dunning's Concise Precedents, p. 510, *et seq.* Action to establish will of real estate.

Probate is conclusive upon the question whether the will does or does not express the true will of the testator. Chancery Division will

Chap. IX.

not set aside
will for fraud
of legatee.

If the whole or any part of a will is procured by fraud the objection must be taken when probate is applied for.

After probate of a will has been granted no proceedings can be taken in the Chancery Division to have the legatee of the whole or any part of the property bequeathed declared a trustee on the ground of fraud. *Allen v. M'Pherson*, 1 H. L. 191; *Meluish v. Milton*, 3 Ch. D. 27.

It would seem that the same principle would apply even in such a case as that already cited of *Mitchell v. Gard*, 3 Sw. & T. 75, *supra*, p. 23, and see *Betts v. Doughty*, 5 P. D. 26, *In re Birchall*; *Wilson v. Birchall*, 29 W. R. 461.

In a Court of Construction no evidence is admissible to show that a clause was left in the will by mistake. *In re Bywater*; *Bywater v. Clarke*, 18 Ch. D. 17.

CHAPTER X.

WHAT PROPERTY MAY BE DISPOSED OF BY WILL.

BY sect. 3 of the Wills Act, it is enacted that every person may, by his will, bequeath or dispose of "all real estate and all personal estate which he shall be entitled to, either at law or in equity, at the time of his death, and which, if not so devised, bequeathed or disposed of, would devolve upon the heir-at-law, or customary heir of him, or, if he became entitled by descent, of his ancestor, or upon his executor or administrator; and that the power thereby given shall extend to all real estate of the nature of customary freehold or tenant right, or customary or copyhold, notwithstanding that the testator may not have surrendered the same to the use of his will, or notwithstanding that, being entitled as heir, devisee or otherwise to be admitted thereto, he shall not have been admitted thereto, or notwithstanding that the same, in consequence of the want of a custom to devise or surrender to the use of a will or otherwise, could not at law have been disposed of by will if this Act had not been made, or notwithstanding that the same, in consequence of there being a custom that a will or a surrender to the use of a will should continue in force for a limited time only, or any other special custom, could not have been disposed of by will according to the power contained in this Act, if this Act had not been made; and also to estates *pur autre vie*, whether there shall or shall not be any special occupant thereof, and whether the same shall be freehold, customary freehold, tenant right, customary or copyhold, or of any other tenure, and whether the same shall be a corporeal or an incorporeal hereditament; and also to all contingent, execu-

Chap. X.

1 Vict. c. 26,
s. 3.

All property
may be dis-
posed of by
will;

comprising
customary
freeholds and
copyholds
without
surrender
and before
admittance;
also such of
them as could
not be devised
before the
Act;

estates *pur
autre vie*;

Chap. X.
contingent
interests ;

rights of
entry ;

and property
acquired after
execution of
will.

Devise of
copyholds.

Lands liable
to escheat.

Whether an
estate *pur
autre vie* to a
man and the
heirs of his
body is
devisable.

tory, or other future interests in any real or personal estate, whether the testator may or may not be ascertained as the person or one of the persons in whom the same respectively may become vested, and whether he may be entitled thereto under the instrument by which the same respectively were created, or under any disposition thereof by deed or will ; and also to all rights of entry for conditions broken, and other rights of entry ; and also to such of the same estates, interests, and rights respectively, and other real and personal estate, as the testator may be entitled to at the time of his death, notwithstanding that he may become entitled to the same subsequently to the execution of his will."

The effect of this section as regards copyholds is to enable the copyholder to devise his estate without a surrender. Until the devisee is admitted the customary estate descends to the heir. Though the lord will not be compelled to admit the heir if there is a devisee, he cannot seize because the devisee refuses to be admitted if the heir is willing to come in. *R. v. Garland*, L. R. 5 Q. B. 269 ; *Garland v. Mead*, *ib.* 6 Q. B. 441 ; see *Allen v. Bewsey*, 7 Ch. D. 453.

It has been suggested that lands of a testator dying without heirs which would therefore not devolve upon "the heir-at-law of him," but would escheat to the lord, are not within this section, and therefore that a will disposing of lands in such a case must be executed with the formalities required by the Statute of Frauds. Williams' Real Prop. 17th ed. p. 53, note ; Dunning's Concise Prec. p. 3. But see, as to the construction of a similar clause in a colonial statute, *Wentworth v. Humphrey*, 11 App. C. 619, P. C.

It appears to be doubtful whether an estate *pur autre vie* limited to a man and the heirs of his body could be disposed of before the Wills Act, if the entail had not been barred. The better opinion seems to be that it could not ; see *Campbell v. Sandys*, 1 Sch. & Lef. 294 ; *Hopkins v. Ramage*, Batty, 365 ; *Blake v. Luxton*, Coop. 185 ; *Allen v. Allen*, 2 Dr. & War. 307, 326 ; and see *Doe v. Luxton*, 6 T. R. 293 ; see 1 Jarman, 61.

The Wills Act apparently leaves the point where it was, since

Chap. X.

sect. 3, which makes devisable all real estate which if not devised would devolve upon the heir-at-law, or customary heir, or upon his executor or administrator, does not in terms extend to real estate, which would descend to the heir special if not devised.

A person in possession of land without other title has a devisable interest. *Asher v. Whitlock*, L. R. 1 Q. B. 1; *Clarke v. Clarke*, I. R. 2 C. L. 395; see *Gresley v. Mousley*, 4 De G. & J. 78.

Title by possession is devisable.

The third section does not make any kind of personalty bequeathable which could not be bequeathed before; thus a testator cannot bequeath a promissory note made to him so as to pass the right to sue on it, which remains in the executor. *Bishop v. Curtis*, 18 Q. B. 879.

But not the right to sue in testator's name.

Property held by the testator in joint tenancy survives to the other joint tenants and cannot be given by will; thus, for instance, property transferred by the testator into the joint names of himself and his wife where there is nothing to rebut the presumption of advancement cannot be given by will, whether by specific gift or otherwise. *Dummer v. Pitcher*, 2 M. & K. 262; *Coates v. Stevens*, 1 Y. & C. Ex. 66; *Grosvenor v. Durston*, 25 B. 97; *Turner v. A.-G.*, I. R. 10 Eq. 386.

Property held in joint tenancy.

A general power to an ascertained person to appoint the use in lands, where the power is to arise only upon a certain contingency, could always be exercised before the contingency happened. *Dalby v. Pullen*, 2 Bing. 144; 9 J. B. Moo. 300; *Logan v. Bell*, 1 C. B. 872.

Power to arise upon a contingency.

Prior to the Wills Act it was held that a general power to appoint property operating upon the legal estate given to the survivor of two persons could not be exercised till the survivor was ascertained. *Doe v. Tomkinson*, 2 Mau. & S. 165.

Power to contingent person over the legal estate.

This doctrine, however, had no application to equitable estates, and is apparently abolished by the Wills Act. *Thomas v. Jones*, 1 D. J. & S. 63.

A power to be exercised by the survivor of two persons "after the decease of the other of them" can of course not be exercised till the survivor is ascertained. *Cave v. Cave*, 8 D. M. & G. 131; *In re Blackburn*; *Smiles v. Blackburn*, 43 Ch. D. 75.

Power exercisable by survivor of two persons.

Chap. X.

The ordinary power in a marriage settlement given to the husband and wife, and the survivor of them, appears to come within this principle. The fact, that the power is given to them jointly during their joint lives, shows that neither was intended to exercise it alone during the life of the other. *In re Moir's Trusts*, 46 L. T. 723; see *MacAdam v. Logan*, 3 B. C. C. 310.

A power to appoint to persons living at a certain time cannot be exercised before the time arrives. *Blight v. Hartnoll*, 19 Ch. D. 294.

Power to be exercised in writing.

A power to be exercised by an instrument in writing could always be exercised by will. *Lisle v. Lisle*, 1 B. C. C. 533.

A general power to appoint by deed or instrument, sealed and delivered before a certain period, cannot be exercised by a will which does not take effect till after the period. *Cooper v. Martin*, 3 Ch. 47.

A power to appoint by will to A. and others may be exercised after A.'s death. *Paske v. Haselfoot*, 2 N. R. 568; 33 B. 125.

Power of disposition not cut down to testamentary power.

Where a power of disposition over property is given to a person, the power may be exercised by deed or will, and will not be cut down to a testamentary power without clear words.

Thus a gift to A. for life, with a power to dispose of the property then or at or after his decease, gives A. a power exercisable by deed or will. *Anon.*, 3 Leon. 71 pl. 108; *Ex parte Williams*, 1 J. & W. 89; *Tomlinson v. Dighton*, 1 P. W. 149; 1 Com. 194; *In re David's Trusts*, Jo. 495; *In re Mortlock's Trusts*, 3 K. & J. 456; *Humble v. Bowman*, 47 L. J. Ch. 62; *In re Jackson's Will*, 13 Ch. D. 189; see, too, *Sinnott v. Walsh*, 5 L. R. Ir. 27. The cases of *Kennedy v. Kingston*, 2 J. & W. 431; *Reid v. Reid*, 25 B. 469; *Freeland v. Pearson*, 3 Eq. 658, may be considered overruled.

On the other hand, if any words are used which would be appropriate only to a testamentary gift, such as leave or bequeath, the power can only be exercised by will. *Doe v. Thorley*, 10 East. 438; *Walsh v. Wallinger*, 2 R. & M. 78; *Paul v. Hewetson*, 2 M. & K. 434.

Possibly, if the tenant for life is restrained from alienation, a power at her decease to dispose of property might be construed

as testamentary only. *Archibald v. Wright*, 9 Sim 161; *In re Flower*; *Edmonds v. Edmonds*, 55 L. J. Ch. 200; 34 W. R. 149; 53 L. T. 717. Chap. X.

Under a gift to A. for life, with power to dispose of the property for her own use, with a gift over "in the event of her decease, should there be anything then remaining," the tenant for life has no power of disposition by will. *In re Thomson's Estate*; *Herring v. Barrow*, 13 Ch. D. 144; 14 Ch. D. 263; *In re Pounder*; *Williams v. Pounder*, 56 L. J. Ch. 113; 56 L. T. 104.

A power to be exercised by an instrument in writing executed with certain formalities is exercisable by will executed with those formalities. *Kibbet v. Lee*, Hob. 312; *Smith v. Adkins*, 14 Eq. 402; *Orange v. Pickford*, 4 Dr. 363.

Sect. 10 of the Wills Act enacts that no appointment made by will in exercise of any power shall be valid unless the same be executed in manner thereinbefore required; and every will so executed shall, so far as respects the execution and attestation thereof, be a valid execution of a power of appointment by will, notwithstanding it shall have been expressly required that a will made in exercise of such power should be executed with some additional or other form of execution or solemnity. S. 10 of the Wills Act.

The section applies to powers created since as well as to powers created before the Act. *Hubbard v. Lees*, L. R. 1 Ex. 255. Applies to powers created since the Act.

The section, however, only applies to powers which are in terms testamentary, and therefore a power to appoint by instrument in writing executed with certain formalities cannot be exercised by a will executed only with the statutory formalities. *West v. Ray, Kay*, 385; *Taylor v. Meads*, 4 D. J. & S. 597. But only to powers testamentary in terms.

By sect. 30 of the Conveyancing and Law of Property Act, 1881, the trust and mortgage estates of testators dying after the 31st December, 1881, vest in their personal representatives. See post, p. 184. Trust and mortgage estates.

Before this Act the question frequently arose whether a trust could be devised, as to which the law appears to have stood as follows :—

Chap. X.

When a trust
may be
devised.

When there was a gift to trustees and the survivor of them his heirs and assigns upon trusts to be executed by the trustees and the survivor of them his heirs and assigns, the power of executing the trusts could be devised by the will of the survivor. *Titley v. Wolstenholme*, 7 B. 425; *Hall v. May*, 3 K. & J. 585.

The same rule applied, when the gift was to the trustees, their heirs, executors, and administrators, the word assigns being omitted. *Osborne to Rowlett*, 13 Ch. D. 774; see *In re Morton & Hallett*, 49 L. J. Ch. 559; 15 Ch. D. 143; *In re Ingleby Boak*, 13 L. R. Ir. 326. The following cases, so far as they decide the contrary, may be considered overruled: *Cooke v. Crawford*, 13 Sim. 91; *Wilson v. Bennett*, 5 De G. & S. 479; *Macdonald v. Walker*, 14 B. 556; *Ashton v. Wood*, 3 Sm. & G. 436; 3 Jur. N. S. 1164.

Property in
dead body.

The executor is entitled to possession of the testator's corpse, and directions given by the will as to the disposition of the body are invalid. *Williams v. Williams*, 20 Ch. D. 659.

Persons
having lawful
custody of
bodies may
permit them
to undergo
anatomical
examination
in certain
cases.

By 2 & 3 Will. IV. c. 75, "An act for regulating Schools of Anatomy," sect. 7, it is enacted that it shall be lawful for any executor or other party having lawful possession of the body of any deceased person, and not being an undertaker, or other party interested with the body for the purpose only of interment, to permit the body of such deceased person to undergo anatomical examination, unless, to the knowledge of such executor or other party, such person shall have expressed his desire, either in writing at any time during his life, or verbally in the presence of two or more witnesses during the illness whereof he died, that his body after death might not undergo such examination, or unless the surviving husband or wife, or any known relative of the deceased person shall require the body to be interred without such examination.

Provision
in case of
persons
directing
anatomical
examinations
after their
death.

By sect. 8 of the same statute it is enacted, that if any person, either in writing at any time during his life, or verbally in the presence of two or more witnesses during the illness whereof he died, shall direct that his body, after death, be examined anatomically, or shall nominate any party by this Act authorised to examine bodies anatomically to make such examination, and

if, before the burial of the body of such person, such direction or nomination shall be made known to the party having lawful possession of the dead body, then such last-mentioned party shall direct such examination to be made, and in case of any such nomination as aforesaid shall request and permit any party so authorised and nominated as aforesaid to make such examination, unless the deceased person's surviving husband or wife, or nearest known relative, or any one or more of such person's nearest known relatives, being of kin in the same degree, shall require the body to be interred without such examination.

Upon the question of cremation, see the cases of *R. v. Price*, Cremation. 12 Q. B. D. 247; *In re Dixon*, (1892) P. 386; *In re Kerr* (1894) P. 284.

CHAPTER XI.

EXECUTORS, GUARDIANS, RELIGIOUS EDUCATION, ETC.

I.—EXECUTORS.

Chap. XI.	A TESTATOR may appoint special executors of any portion of his property; see 2 Key & Elphinstone, 890; 4 Dav. Conv. 102; Dunning, Conc. Prec. 485.
Special executors.	He may also appoint different executors for different countries. <i>In bonis Wallich</i> , 1 Sw. & T. 423; <i>Velho v. Leite</i> , <i>ib.</i> 456. The executor appointed in the country of the testator's domicile is entitled to receive the clear surplus in the hands of limited executors. <i>Eames v. Hacon</i> , 18 Ch. D. 347.
Substituted executors.	A testator may substitute other executors in the event of the absence or death of those appointed. <i>In bonis Langford</i> , 1 P. & D. 458; <i>In bonis Foster</i> , 2 P. & D. 304.
Delegation of power.	And he may delegate the power of appointing executors to another who may appoint himself. <i>In bonis Cringan</i> , 1 Hag. 543; <i>In bonis Ryder</i> , 2 Sw. & T. 127.
Married woman executrix.	Since the Married Women's Property Act, 1882, a married woman can act as executrix without her husband's consent. <i>In bonis Ayres</i> , 8 P. D. 168. Before that Act, if the husband refused his consent, probate was granted to the married woman's attorney. <i>Clerke v. Clerke</i> , 6 P. D. 103.
Executors appointed by several instruments.	A person appointed executrix of all property not named in the will is not an executrix of the will or entitled to probate. <i>In bonis Wakeham</i> , 2 P. & D. 395. Where there are several testamentary papers not inconsistent and each appointing sole executors, probate is granted to all the executors. <i>In bonis Graham</i> , 3 Sw. & T. 69; <i>Geaves v. Price</i> , 3 Sw. & T. 71. See <i>In bonis Morgan</i> , 1 P. & D. 323.

Reappointment by a codicil of some of the executors appointed by the will together with new executors does not revoke the appointment of executors contained in the will. *In bonis Leese*, 2 Sw. & T. 442; *In re Lloyd*, 1 R. 6 Eq. 348.

A codicil appointing a person "sole" executor of the will revokes the appointment of executors made by the will. *In bonis Lowe*, 3 Sw. & T. 478; *In bonis Baily*, 1 P. & D. 628.

Where a testator appointed A. without saying to what office, and afterwards referred to his executor, A. was held to be executor. *In bonis Bradley*, 8 P. D. 215; see *In bonis Earl of Leven and Melville*, 15 P. D. 22.

Though no executors are expressly appointed, if the testator has directed any person to pay his debts and administer the estate, such person will be executor according to the tenor. *In bonis Montgomery*, 5 N. of C. 99; *In bonis Adamson*, 3 P. & D. 253; *In bonis Bluett*, 15 L. R. Ir. 140; *In bonis Wilkinson*, (1892) P. 227. See *In bonis Lush*, 13 P. D. 20; *In bonis Russell*; *In bonis Laird*, (1892) P. 380; *In bonis Tandy*, 27 L. R. Ir. 114.

Executor according to tenor.

Thus, trustees to whom the testator's personal estate is given, subject to a charge of debts, are in effect executors. *In bonis Baylis*, 1 P. & D. 21; *In bonis Bell*, 4 P. D. 85; see *In bonis Palmer*, 11 L. R. Ir. 1; *In bonis Hamilton*, 17 L. R. Ir. 277; *In bonis Gray*, 21 L. R. Ir. 277.

A request that certain persons shall act for or with an executrix appointed by the will, makes them executors according to the tenor. *In bonis Brown*, 2 P. D. 110.

Request to act with executrix.

A person appointed to carry out the intentions of the will is executor according to the tenor. *In re Archdall*, 5 L. R. Ir. 168; *In bonis McKane*, 21 L. R. Ir. 1; *In bonis Allam*, 66 L. T. 382.

The appointment of a person sole trustee of a will will not in itself make him executor according to the tenor. *In bonis Punchard*, 2 P. & D. 369; *In bonis Lowry*, 3 P. & D. 157. See *Boardman v. Stanley*, 1 R. 6 Eq. 590; *Smith v. Kerran*, 1 R. 11 Eq. 447. See *In bonis Earl of Leven and Melville*, 15 P. D. 22.

Sole trustee not an executor.

It seems trustees to whom the residue only is given on trust
T.W.

G

Chap. XI.

to pay debts are not executors. *In bonis Love*, 7 L. R. Ir. 178. See *In bonis Toomy*, 3 Sw. & T. 562.

And when in exercise of a testamentary power property is directed to be distributed by the trustees of the settlement, this does not make the trustees executors. *In bonis Fraser*, 2 P. & D. 183.

II.—GUARDIANS.

Parents may dispose of the custody of children during minority.

By 12 Car. II. c. 24, sect. 8, it is enacted that where any person hath or shall have any child or children under the age of one-and-twenty years, and not married at the time of his death, that it shall and may be lawful to and for the father of such child or children, whether born at the time of the decease of the father, or at that time in *ventre sa mère*, or whether such father be within the age of one-and-twenty years, or of full age, by his deed executed in his lifetime, or by his last will and testament in writing, in the presence of two or more credible witnesses, in such manner and from time to time as he shall respectively think fit, to dispose of the custody and tuition of such child or children, for and during such time as he or they shall respectively remain under the age of one-and-twenty years, or any lesser time, to any person or persons in possession or remainder, other than popish recusants; and that such disposition of the custody of such child or children made since the 24th of February, 1645, or hereafter to be made, shall be good and effectual against all and every person or persons claiming the custody or tuition of such child or children as guardian in socage or otherwise; and that such person or persons, to whom the custody of such child or children hath been or shall be so disposed or devised as aforesaid, shall and may maintain an action of ravishment of ward or trespass against any person or persons which shall wrongfully take away or retain such child or children, for the recovery of such child or children; and shall and may recover damages for the same in the said action, for the use and benefit of such child or children.

Actions of ravishment of wards.

The lands of children and the management

Sect. 9 of the same statute enacts, that such person or persons, to whom the custody of such child or children hath been or shall be so disposed or devised, shall and may take into his or their custody to the use of such child or children, the

profits of all lands, tenements, and hereditaments of such child or children; and also the custody, tuition, and management of the goods, chattels, and personal estate of such child or children, till their respective age of one-and-twenty years, or any lesser time, according to such disposition aforesaid; and may bring such action or actions in relation thereunto, as by law a guardian in common socage may do.

Chap. XI.

of their personal estate by their guardians.

Sect. 1 of the Wills Act declares that the word will shall include a disposition by will of the custody of a child under 12 Car. II. c. 24. It follows that an infant cannot appoint testamentary guardians by will (sect. 7).

The testamentary guardian can give a good receipt for a legacy left to the infant though the Court will not necessarily pay to him a fund belonging to the infant which has been paid into Court under the Legacy Duty Act. *McCreight v. McCreight*, 13 Ir. Eq. 314; *Re Cresswell*, 45 L. T. 468.

Receipt for legacy by testamentary guardian.

And an infant may give a valid receipt if a legacy is directed to be paid to him before he comes of age. *In re Deneker; Peters v. Banckerean*, W. N. (1895), 28.

An instrument appointing a testamentary guardian is valid though attested by the guardian. *Morgan v. Hatchell*, 24 L. J. Ch. 135.

The statute enables a father to give a testamentary guardian authority to nominate a guardian. *In bonis Parnell*, 2 P. & D. 379.

Father may delegate appointment of guardian.

A father has no legal power to appoint a testamentary guardian of his illegitimate children, though the person selected by him would in most cases be appointed by the Court. *Sleeman v. Wilson*, 13 Eq. 36; see *Re Ullee; the Nawab Nazim of Bengal's Infants*, 53 L. T. 711; 54 L. T. 286.

Illegitimate children.

The testamentary guardian has a legal right to the custody of the child, and is entitled to a writ of habeas corpus to obtain possession of his ward. *In re Andrews*, L. R. 8 Q. B. 153; see, too, *In re Ethel Brown*, 13 Q. B. D. 614.

Guardian entitled to custody.

There is nothing to prevent a father from appointing a Roman Catholic ecclesiastic the guardian of his children. *Talbot v. Earl of Shrewsbury*, 4 M. & Cr. 672; *In re Andrews*, L. R. 8 Q. B. 153; *In re Byrnes*, I. R. 7 C. L. 199.

Chap. XI.

How guardian
appointed.

No precise words are necessary to appoint a testamentary guardian.

Thus it is sufficient to direct, that the children are to be brought up under the care and direction of a certain person, or that he is to have the management and care of the house and children, or that he is to take care to see the child educated. *Bridges v. Hales*, Moseley, 109; *Miller v. Harris*, 14 Sim. 540; 9 Jur. 388; *Lady Teynham v. Lennard*, 4 B. P. C. 302.

A person appointed guardian of the estate is not a testamentary guardian. *In re Norbury*, I. R. 9 Eq. 134.

As to the rights of the mother of an illegitimate child, see *Reg. v. Nash*, 10 Q. B. D. 454; *Barnardo v. McHugh*, (1891) 1 Q. B. 194; (1891) A. C. 388; *Re Ullee*; *the Nawab Nazim of Bengal's Infants*, 53 L. T. 711; 54 L. T. 286.

Before the Guardianship of Infants Act, 1886 (49 & 50 Vict. c. 27), the mother had no testamentary power of appointing guardians, but that Act provides as follows:—

On death of
father mother
to be guardian
alone or
jointly with
others.

2. On the death of the father of an infant, and in case the father shall have died prior to the passing of this Act, then from and after the passing of this Act the mother, if surviving, shall be the guardian of such infant, either alone when no guardian has been appointed by the father, or jointly with any guardian appointed by the father. When no guardian has been appointed by the father, or if the guardian or guardians appointed by the father is or are dead or refuses or refuse to act, the Court may if it shall think fit, appoint a guardian or guardians to act jointly with the mother.

Mother may
appoint
guardians
in certain
cases.

3 (1). The mother of any infant may by deed or will appoint any person or persons to be guardian or guardians of such infant after the death of herself and the father of such infant (if such infant be then unmarried), and where guardians are appointed by both parents they shall act jointly.

(2) The mother of any infant may by deed or will provisionally nominate some fit person or persons to act as guardian or guardians of such infant after her death jointly with the father of such infant, and the Court, after her death, if it be shown to the satisfaction of the Court that the father is for any reason unfitted to be the sole guardian of his children, may

confirm the appointment of such guardian or guardians, who shall thereupon be authorized and empowered so to act as aforesaid, or make such other order in respect of the guardianship as the court shall think right. Chap. XI.

(3) Authorises the guardians, if they cannot agree, to apply to the Court for directions.

4. Every guardian in England or Ireland under this Act shall have all such powers over the estate and the person, or over the estate (as the case may be) of an infant as any guardian appointed by will or otherwise now has in England under the Act 12 Car. II. c. 24, or in Ireland under the Act of the Irish Parliament 14 & 15 Car. II. c. 19 or otherwise. Powers of guardian.

A testamentary appointment of a guardian by the mother is not invalid because the guardian is not expressed to be appointed jointly with the father. *In re G.*, (1892) 1 Ch. 292.

III.—RELIGIOUS EDUCATION.

A father is entitled to direct the religion in which he wishes his children to be brought up after his death, and this right is not affected by the Guardianship of Infants Act, 1886. *In re Scanlan*, 40 Ch. D. 200. Religious education.

But the cases show, that less weight will be given to the wishes of a deceased than to those of a living father, and that in the former case the Court will not interfere in favour of the religion selected by the father if he has done anything amounting to an abandonment of his rights, or if the interference would not be for the benefit of the children. *Hawksworth v. Hawksworth*, 6 Ch. 539; *Andrews v. Salt*, 8 Ch. 622; *In re Agar-Ellis*; *Agar-Ellis v. Lascelles*, 10 Ch. D. 49; 24 Ch. D. 317; *In re Clarke*, 21 Ch. D. 817; *In re Walsh*, 13 L. R. Ir. 269; *In re Nevin*, (1891) 2 Ch. 299; *In re McGrath*, (1893) 1 Ch. 143; *In re Magees*, 31 L. R. Ir. 513.

IV.—AGENTS, SOLICITORS.

A testator may, there can be no doubt, appoint a person, agent or solicitor to his estate in such a way as to entitle the Appointment of agent or solicitor.

Chap. XI.

person to be employed. *Hibbert v. Hibbert*, 3 Mer. 681; *Williams v. Corbet*, 8 Sim. 349.

But a request that a particular person may be employed as manager or receiver, or a declaration that a particular person is to be the solicitor to the estate, does not impose on the trustees a duty to employ him. *Shaw v. Lawless*, 5 Cl. & F. 129; *Finden v. Stephens*, 2 Ph. 142; *Belaney v. Kelly*, 19 W. R. 1171; *Foster v. Elsley*, 19 Ch. D. 518.

V.—ADMINISTRATION ACTION.

Direction to
administer
the estate in
an action.

A direction by the testator to his trustees to commence an action for the administration of his estate by the Court, does not deprive the Court of its discretion to refuse an order, though weight will be given to it by the Court in determining whether an order should be made. *In re Stocken*; *Jones v. Hawkins*, 88 Ch. D. 319.

CHAPTER XII.

ELECTION.

A TESTATOR can of course only dispose of his own property by will; however, by means of the doctrine of election, he may in many cases in effect dispose of the property of others. Thus, where a testator disposes of the property of a person, and at the same time gives that person property of his own by his will, the person whose property is given away is bound to elect whether he will keep his own property and surrender an equivalent value of the benefits given him by the will, or whether he will take entirely under the will. *Rogers v. Jones*, 3 Ch. D. 688; *Re Carpenter*; *Carpenter v. Disney*, 51 L. T. 773.

Chap. XII.

When election
arises.

The compensation, which has to be made by a person electing to take against the will, is a charge upon the benefits he receives under the will, so that if he takes real estate under the will and dies before making compensation, the compensation is a charge on the land, and is not payable out of his personal estate. *Pickersgill v. Rodger*, 5 Ch. D. 163.

A person electing to take under the instrument must do all in his power to give effect to the instrument, but if it is out of his power to give effect to it, he is not bound to make compensation to persons who do not get the benefits which the testator intended them to take.

Thus, where chattels are settled as heirlooms with a mansion house, and a testator attempts to dispose of the chattels, and gives benefits to the tenant for life of the mansion house, the tenant for life taking under the will is not bound to compensate the legatees of the chattels, as he has no disposable interest in the chattels apart from the mansion house. *In re Lord Chesham*; *Cavendish v. Dacre*, 31 Ch. D. 466.

Chap. XII.

Legatee must elect for or against the whole instrument, will and codicils.

The person electing must elect to take under or against the whole instrument, will and codicils, and not merely that part of it which disposes of his own property. *Cooper v. Cooper*, L. R. 6 Ch. 15; *ib.* 7 H. L. 53.

Two contemporaneous instruments, *e.g.*, a deed under a power and a will, which effectuate one entire disposition, are, for the purposes of raising an election, treated as one instrument. *Kirkham v. Smith*, 1 Ves. Sen. 258; *Bacon v. Cosby*, 4 De G. & S. 261; *In re Woodleys*, 29 L. R. Ir. 304.

Unless the testator limits the election to some particular benefit.

If, however, there is a gift expressly in lieu of dower, or the testator declares that the legatee is to elect only between one of the benefits given him by the will and his own property, election will be confined to that. *Walker v. Inge*, Rom. N. of C. 95; *East v. Cook*, 2 Ves. Sen. 30, explained in *Wilkinson v. Dent*, 6 Ch. 339; *Coots v. Gordon*, 1 R. 11 Eq. 180.

Gift in satisfaction of a debt will not limit election to that particular gift.

But a gift, though declared to be in satisfaction of any sums in which the testator may be indebted to the donee at the time of his decease, or in satisfaction of a rent charge, the object being testamentary bounty, will put the legatees to their election to take under or against the whole will. *Wilkinson v. Dent*, 6 Ch. 339; see, too, *Coutts v. Acworth*, 9 Eq. 519.

Election arises only between a title under and a title *dehors* the will.

No election where one of two gifts is onerous.

Election arises only between a gift by the will and something belonging to the legatee by a title *dehors* the will. Thus, no case for election arises where a testator has given a legatee several legacies, some of which are onerous. In such a case the legatee may reject the onerous legacies without forfeiting the others. *Andrew v. Trinity Hall*, 9 Ves. 525; *Moffett v. Bates*, 3 Sm. & G. 468; *Warren v. Rudall*, 1 J. & H. 1; *Aston v. Wood*, 22 W. R. 893; 43 L. J. Ch. 715.

And a legatee of a house subject to a mortgage and of an annuity is not bound to make up the interest on the mortgage if the house is insufficient to satisfy the mortgage debt. *Syer v. Gladstone*, 30 Ch. D. 614.

Unless there is an intention that the legatee is to take all or none.

But, if the onerous and beneficial legacies are given together as one entire gift, or there is an intention that the legatee shall not take one without the other, he must take all or none. *Green v. Britten*, 42 L. J. Ch. 187; *Talbot v. Lord Radnor*, 3 M. & K. 252; *Guthrie v. Walrond*, 22 Ch. D. 573; *In re Hotchkys*;

Freke v. Calmady, 32 Ch. Div. 408; see *Fairtlough v. Johnstone*, Chap. XII.
16 Ir. Ch. 442.

And upon the same principle election does not arise as between two clauses in the same will, the title to both the properties between which the legatee would have to elect being derived under the will. *Wollaston v. King*, 8 Eq. 165; *Wallinger v. Wallinger*, 9 Eq. 301.

No election between two clauses of a will.

Devises and bequests upon condition must be distinguished from cases of election. *Cooper v. Cooper*, L. R. 6 Ch. 15; *ib.* 7 H. L. 53.

Devise upon condition distinguished from election.

In the latter it is immaterial whether the testator knew or not that the property of which he was disposing was not his own, in the former he must have known that it was not. The characteristic of the former is forfeiture, of the latter compensation. Thus a devise to A. on condition of his conveying certain property of his own, would be a condition and not a case for election. See *Middleton v. Windross*, 16 Eq. 212; *Boughton v. Boughton*, 2 Ves. Sen. 12; *Fearon v. Fearon*, 3 Ir. Ch. 19.

In order to raise a case for election there must be on the face of the will a disposition on the part of the testator of something belonging to a person who takes an interest under the will.

To raise election the testator must actually dispose of something not his own.

An appointment of property in supposed exercise of a power, which does not exist, raises a case of election as against the person entitled to the property. *In re Brooksbank*; *Beauclerk v. James*, 34 Ch. D. 160.

Appointment under non-existing power.

The intention to dispose of something not his own must appear on the face of the will, and evidence is not admissible to show that the testator considered certain property as his own, and intended to pass it by words not directly referring to it; see *Pole v. Lord Somers*, 6 Ves. 322; *Doe v. Chichester*, 4 Dow. 76, pp. 89, 90; *Re Booker*; *Booker v. Booker*, 54 L. T. 239; 34 W. R. 346.

An erroneous belief on the part of the testator, that certain property has been disposed of in a particular way, even though he expressly declares that he has made his will on the faith of it, will not raise an election. *Langston v. Langston*, 21 B. 552; *Dashwood v. Peyton*, 18 Ves. 27; *Box v. Barrett*, 3 Eq.

Erroneous belief or recital will not raise election.

Chap. XII.

244 ; see *Lewis v. Lewis*, I. R. 11 Eq. 340 ; *In re Woodleys*, 29 L. R. Ir. 304.

Extent of doctrine.

The doctrine of election applies whether the interest disposed of by the testator is vested, contingent, or in reversion. *Wilson v. Lord Townshend*, 2 Ves. Jun. 693 ; *Webb v. Earl of Shaftesbury*, 7 Ves. 480 ; *Williams v. Mayne*, I. R. 1 Eq. 519.

Election by married woman.

A married woman can elect during coverture. *Barrow v. Barrow*, 4 K. & J. 409 ; *Smith v. Lucas*, 18 Ch. D. 531 ; *Wilder v. Pigott*, 22 Ch. D. 263 ; *Greenhill v. North British and Mercantile Insurance Co.*, (1893) 3 Ch. 474.

In an Irish case it was held that where a legacy is given to a married woman whose reversionary interest in personal estate is disposed of, she cannot elect to relinquish her reversionary interest until it falls into possession. Consequently the legacy was impounded until she could elect. *Williams v. Mayne*, I. R. 1 Eq. 519, not approved in *In re Lord Chesham* ; *Cavendish v. Dacre*, 31 Ch. D. 466 ; see *Wall v. Wall*, 15 Sim. 513 ; *Robinson v. Wheelwright*, 6 D. M. & G. 535.

The Court has jurisdiction to elect on behalf of a lunatic not so found by inquisition. *Wilder v. Pigott*, 22 Ch. D. 263.

Release of a debt due from a third person to a legatee.

The release of a debt due to the testator from A., the testator at the same time releasing a debt due from B. to A., will put A. to his election. *Synge v. Synge*, 15 Eq. 389 ; 9 Ch. 128.

Legatee must be entitled to the property given away at the testator's death.

It is sufficient to raise election if the property disposed of by the testator is the property of a person taking a benefit under the will at the date of the testator's death, and a title as next of kin to an intestate whose estate has not at the date of the death been fully administered is sufficient. *Cooper v. Cooper*, L. R. 6 Ch. 15 ; 7 H. L. 53 ; see *Bennett v. Houldsworth*, 6 Ch. D. 671.

Title as next of kin to an intestate.

In such a case, for the purpose of election, the interest of the next of kin is to be estimated as it was at the death of the intestate, his debts being rateably distributed over his estate, *ib.*

But if the property in question is not acquired till after the death of the testator, no election arises in respect of it. *Howells v. Jenkins*, 2 J. & H. 706 ; 1 D. J. & S. 617 ; *Grissell v. Swinhoe*, 7 Eq. 291, in which case it seems the husband would have been

bound to elect if he had been his wife's administrator at the testator's death. See *Cooper v. Cooper*, 6 Ch. 15, p. 21; *In re Lord Chesham*; *Cavendish v. Dacre*, 31 Ch. D. 466. Chap. XII.

And where a wife had elected to take an estate against the will, the husband, being tenant by the curtesy, was not again put to his election between his tenancy by the curtesy and benefits given to him by the will, compensation having been already made for the value of the estate. *Lady Cavan v. Pulteney*, 2 Ves. Jun. 544; 3 Ves. 384. Derivative title.

So, too, the right of a creditor to be paid out of property belonging to an intestate, and disposed of by the testator, being merely a personal right, will not put the creditor to election between his claim upon the intestate's estate and a benefit given by the will. See *Cooper v. Cooper*, L. R. 7 H. L. 53, p. 66; *Kidney v. Coussmaker*, 12 Ves. 136. Mere personal right.

When a testator having a special power of appointment over certain property, appoints absolutely to the objects of the power, and superadds a condition or request that they shall give the property in a certain way, no case of election arises, the illegal condition being considered struck out of the will. *Carver v. Bowles*, 2 R. & M. 301; *Blacket v. Lamb*, 14 B. 482; *Woolridge v. Woolridge*, Johns. 63; *Churchill v. Churchill*, 5 Eq. 44. See *King v. King*, 15 Ir. Ch. 479; *Moriarty v. Martin*, 3 Ir. Ch. 26; *White v. White*, 22 Ch. D. 555. Appointment under a special power with invalid condition superadded raises no election.

Where there is no absolute gift in the first instance, but the original gift is subject to invalid limitations over and restrictions, the objects of the power must elect between their rights under the power and the other benefits given them by the will. *Tomkyns v. Blane*, 28 B. 422; *White v. White*, 22 Ch. D. 555; *King v. King*, 13 L. R. Ir. 531. It does when the whole appointment is invalid.

And generally election arises, where property subject to a special power of appointment vested in the testator, is given by him to persons not the objects of the power when the latter receive benefits under the will. *Whistler v. Webster*, 2 Ves. Jun. 366; *In re Wells' Trusts*; *Hardisty v. Wells*, 42 Ch. D. 646. Property subject to a special power.

It has been held that where the property is appointed to objects of the power but the appointment is void for remoteness,

Chap. XII.

the persons taking in default of appointment are not bound to elect. The cases require reconsideration. *In re Warren's Trusts*, 26 Ch. D. 208; *In re Handcock's Trusts*, 23 L. R. Ir. 34; see *In re Wheatley*; *Smith v. Spence*, 27 Ch. D. 806.

What is a disposition by a testator of property not his own.

It must be presumed *prima facie* that a testator only means to dispose of what is his own.

General words limited to testator's own property.

Therefore, even in wills made before the Wills Act, general words will not be construed to apply to property not belonging to the testator, though at the date of his will and his death he may have no property of his own to which the words could apply. *Read v. Crop*, 1 B. C. C. 492; *Jervoise v. Jervoise*, 17 B. 566; *Thornton v. Thornton*, 11 Ir. Ch. 474.

Devise in strict settlement where testator has only estate *pur autre vie*.

Nor will the fact that the devise is to uses in strict settlement extend general words to more than the testator's interest, though his devisable interest is only an estate *pur autre vie*. See *Cosby v. Lord Ashdown*, 10 Ir. Ch. 219.

The testator may of course show that he included lands not his own under the general words by describing them as lands in his own occupation. *Honywood v. Foster*, 30 B. 14.

Property in a particular place.

And if the devise be of property in a particular place, if there is any property of the testator answering the description it will be confined to that. *Rundliffe v. Parkyns*, 6 Dow. 149; *Maddeson v. Chapman*, 1 J. & H. 470.

Property held in joint tenancy.

So where a testator has transferred stock into the names of himself and his wife, a general gift of his stock, or even a gift of stock exactly the same in amount as that so transferred, will not put the wife to her election. *Dummer v. Pitcher*, 2 M. & K. 262; *Poole v. Odling*, 10 W. R. 337.

To raise a case of election there must be a specific reference to the stock in question. *Coates v. Stevens*, 1 Y. & C. Ex. 66; *Grosvenor v. Durston*, 25 B. 97.

The case is more difficult where the testator has a devisable interest in certain property, and the question arises whether he intended to give the whole property.

1. Where the testator is entitled in moieties :

When the testator is entitled in moieties.

If the devise is of the testator's interest or property in a house or lands, only what belongs to him is intended to pass. *Henry v. Henry*, 1 R. 6 Eq. 286.

But if the gift is of a house by a particular description, this is a sufficient indication of an intention to pass the whole house, at any rate if there is a direction to repair. *Padbury v. Clark*, 2 Mac. & G. 298; *Howells v. Jenkins*, 2 J. & H. 706. See *Swan v. Holmes*, 19 B. 471.

Chap. XII.

Gift of a house with a direction to repair.

And the result is the same where there is no such direction. *Fitzsimons v. Fitzsimons*, 28 B. 417; *Miller v. Thurgood*, 33 B. 496; *Wilkinson v. Dent*, 6 Ch. 339.

2. Where land is subject to a charge, a devise of the land without more is a devise subject to the charge. *Stephens v. Stephens*, 3 Dr. 697; 1 De. G. & J. 62; *Henry v. Henry*, 1 R. 6 Eq. 286.

When the testator is entitled to land subject to a charge.

On the other hand, if the testator repudiates the instrument creating the charge, and the dispositions of his will are inconsistent with that instrument, the property is intended to pass freed from the charge. *Sadlier v. Butler*, 1 R. 1 Eq. 415.

So, too, if the devise of the land is inconsistent with the charge, as if it be for a long term on trust to raise a sum immediately for payment of debts and legacies, the prior charge being itself secured by a long term. *Blake v. Bunbury*, 1 Ves. Jun. 514.

3. Where the testator has a reversionary interest in land, limited to take effect after the decease of persons to whom he gives a life interest in those lands, so that the will would be of no effect if it were intended only to deal with the reversion, and there are besides powers of leasing and management implying actual enjoyment, the intention must have been to dispose of the whole property. *Welby v. Welby*, 2 V. & B. 187; *Wintour v. Clifton*, 21 B. 447; 8 D. M. & G. 641.

When the testator is entitled to the reversion in lands.

So, too, a direction that an annuity is to be paid to a person for life out of lands of which the testator has only the reversion shows an intention to dispose of the whole. *Usticke v. Peters*, 4 K. & J. 437.

But if in a doubtful case the testator expressly confirms the settlement by which the reversion in the property in question is limited to him, only his own interest will be held to be intended to pass. *Randcliffe v. Parkyns*, 6 Dow. 149.

4. The question whether the testator has shown an intention What

Chap. XII.

amounts to
an intention
to dispose of
lands free
from dower or
freebench.

to dispose of his real estate, freed from the widow's right to dower or freebench, is of importance only, with regard to the former, in the case of widows married prior to the 1st January, 1834; and with regard to the latter, in the case of wills not coming under the Wills Act; see the Dower Act, 3 & 4 Will. 4, c. 105, ss. 4 and 14. *Lacey v. Hill*, 19 Eq. 346.

As to freebench, it was decided in *Lacey v. Hill*, *supra*, that, by virtue of the third section of the Wills Act, a devise of copyholds, though not surrendered to the uses of the will, is sufficient to bar the widow's claim. The point does not appear to have been raised in *Thompson v. Burra*, 16 Eq. 592.

Gift in lieu
of dower—

In cases, however, under the old law, the widow is, of course, put to her election if a legacy is given to her expressly in lieu of dower. *Sopwith v. Maughan*, 30 B. 235.

what it
includes.

A legacy in lieu of dower would, it seems, also include freebench and dower out of lands which the testator had no power to devise. *Nottley v. Palmer*, 2 Dr. 93; *Walker v. Walker*, 1 Ves. Sen. 54. See *Wetherell v. Wetherell*, 4 Giff. 51.

What is in-
consistent
with the
widow's right
to dower.

If the dispositions of the will are inconsistent with the widow's right to have her dower set out by metes and bounds, she will be put to her election. This will be the case:—

Personal use
by the de-
visee.

a. If a house, being a portion of the property devised, is given for the personal use and occupation of the devisee. *Miall v. Brane*, 4 Mad. 119; *Roadley v. Dixon*, 3 Russ. 192.

Devise in
definite
proportions.

b. A devise of realty in definite proportions between the widow and others would not itself show that the widow was not intended to take her dower. But if the property is particularised so as to show that the testator is giving not merely his estate, but the whole property itself, this is sufficient to show that dower was meant to be excluded. *Reynolds v. Torin*, 1 Russ. 129; *Chalmers v. Storril*, 2 V. & B. 222, as explained in *Bending v. Bending*, 3 K. & J. 257. See *Roberts v. Smith*, 1 S. & St. 513. In *Dickson v. Robinson*, Jac. 503, the will is not stated.

Trust to sell
and divide.

A direction that the proceeds of sale are to be divided in certain shares will not have this effect. *Ellis v. Lewis*, 3 Ha. 314.

Powers of
leasing.

c. If powers of leasing are given, even though they be only

from year to year. *Reynard v. Spence*, 4 B. 103; *O'Hara v. Chap. XII.*
Chaine, 1 J. & Lat. 662; *Parker v. Sowerby*, 1 Dr. 488; 4 D.
 M. & G. 321; *Lowes v. Lowes*, 5 Ha. 501; *Hall v. Hill*, 1 Dr.
 & War. 94; *Linley v. Taylor*, 1 Giff. 67; see *Warbuton v.*
Warbuton, 2 Sm. & G. 163.

And it seems that a power of leasing is inconsistent with the widow's right to freebench, though it may not be the custom of the manor to set out freebench by metes and bounds. *Thompson v. Burra*, 16 Eq. 592.

But a trust for sale will not have this effect, unless the Trust for sale.
 property given in trust for sale is specifically directed to include something such as a house, the whole of which the testator must have intended to be subject to the trusts. *Gibson v. Gibson*, 1 Dr. 42; *Bending v. Bending*, 3 K. & J. 257; *Parker v. Downing*, 4 L. J. Ch. 198.

The gift of an annuity to the wife, charged upon the property Gift of an-
 subject to dower, will not put her to election. *Dowson v. Bell*, nuity charged
 1 Kee. 761; *Harrison v. Harrison*, 1 Kee. 765; *Holdich v.* on land sub-
Holdich, 2 Y. & C. C. 18. ject to dower.

Nor will a devise of a portion of the testator's real estate to his widow prevent her from claiming dower in the rest. *Lawrence v. Lawrence*, 2 Ver. 365; 1 Eq. C. Ab. 218, pl. 2; 1 Freem. 234; 3 B. P. C. 484.

5. Under the old law, by which a testator could not by a will dispose of lands acquired after the date of the will, the heir was nevertheless put to his election if there was a clear intention to dispose of them. When the
 heir is put
 to election.

It is clear that such an intention is sufficiently indicated where the testator draws a distinction between lands to which he is entitled and lands to which he may be entitled at his decease. *Schroder v. Schroder*, Kay, 578; 24 L. J. Ch. 510; *Hance v. Truwhitt*, 2 J. & H. 216. Disposition of
 after-acquired
 lands before
 the Wills Act.

And it seems the words "land which I shall die possessed of" sufficiently indicate an intention to pass after-acquired lands, and not merely so much of the lands belonging to the testator at the date of his will as shall remain at his death. *Churchman v. Ireland*, 1 R. & M. 250, overruling *Back v. Kett*, Jac. 534.

Chap. XII.

No election
when the will
invalid to
pass realty.

Under the old law, where the will was insufficiently executed to pass realty, the heir was not put to his election between realty attempted to be disposed of by the will and benefits given to him, so much of the will as attempted to dispose of realty being considered non-existent. *Sheddon v. Godrich*, 8 Ves. 481.

So, too, when under the old law the testator or testatrix was incompetent to dispose of property from infancy or coverture no case of election arose. *Hearle v. Greenbank*, 1 Ves. Sen. 298; 3 Atk. 696; *Rich v. Cockell*, 9 Ves. 370; *In re De Burgh Lawson*; *De Burgh Lawson v. De Burgh Lawson*, 34 W. R. 39.

But the case is different where the devise is upon condition. *Boughton v. Boughton*, 2 Ves. Sen. 12.

Foreign heir.

These rules do not, however, apply to a foreign heir, and therefore if there is clear evidence of an intention to dispose by will of land in Scotland or elsewhere which cannot be so disposed of, the heir is put to his election between the land and the benefits he may take under the will. *Brodie v. Barry*, 2 V. & B. 127; *Dewar v. Maitland*, L. R. 2 Eq. 834.

It must be clear that land in Scotland or elsewhere is referred to, and therefore general words will only be held to refer to those lands upon which the will can take effect. *Johnson v. Telford*, 1 R. & M. 244; *Allen v. Anderson*, 5 Ha. 163; *Maxwell v. Maxwell*, 16 B. 106; 2 D. M. & G. 705; *Maxwell v. Hyslop*, 4 Eq. 407; *Baring v. Ashburton*, 54 L. T. 463.

But a devise of "all my real estate in any part of the United Kingdom or elsewhere" has been held sufficient to put the Scotch heir to election. *Orrell v. Orrell*, 6 Ch. 302.

Will of
married
woman.

It would seem that no case for election arises on the part of next of kin, where the will of a married woman is operative at the time it was made, but afterwards becomes inoperative. *Blaklock v. Grindle*, 7 Eq. 215.

To raise
election there
must be a gift
of free dis-
posable pro-
perty to the
persons whose
property is
given away.

The principle of election being compensation, in order to put persons whose property the testator has given away to their election, there must be a gift to them of free disposable property out of which compensation may be made. Thus an appointment by the testator of property, subject to a special exclusive power of appointment, to some objects of the power whose

property the testator attempts to dispose of, is not a gift of free disposable property, in respect of which they will be bound to elect. *Fowler's Trust*, 27 B. 362; *Aplin's Trust*, 13 W. R. 1062.

And upon the same principle the life interest of a married woman subject to a restraint upon anticipation is not available to compensate persons disappointed by her election. *In re Vardon's Trusts*, 31 Ch. D. 275, following *Smith v. Lucas*, 18 Ch. D. 531; *In re Wheatley*, 27 Ch. D. 606, and reversing *Willoughby v. Middleton*, 2 J. & H. 344. See, too, *Hamilton v. Hamilton*, (1892) 1 Ch. 396.

Upon the question, whether, where a stranger appoints a testamentary guardian to children and gives their father a benefit under the will, the father is put to his election, so that he cannot after receiving the legacy withhold compliance with the condition for the education of his children, see *Blake v. Leigh*, Amb. 306; *De Manneville v. De Manneville*, 10 Ves. 52, 63.

CHAPTER XIII.

WHO MAY BE DEVISEES OR LEGATEES.

Chap. XIII.

1. Corporations.

1. PRIOR to the Wills Act a devise of lands to a corporation was void, bodies corporate being excepted out of 32 Hen. 8, c. 1, and 34 & 35 Hen. 8, c. 5, sect. 5.

And it seems that 43 Eliz. c. 4 had no effect in passing the legal estate where the devise was to a corporation existing for charitable purposes, notwithstanding *Benet Coll. v. Bishop of London*, 2 W. Bl. 1182; see *Incorp. Soc. v. Richards*, 1 Dr. & War. 258.

The Wills Act repeals 32 Hen. 8, c. 1, and 34 & 35 Hen. 8, c. 5, but does not expressly authorise devises to corporations, and since the inability of corporations to hold lands was created by various statutes antecedent to 34 & 35 Hen. 8, c. 5, the mere repeal of that statute does not give validity to devises to corporations.

Since the Wills Act, however, the inability is not in the power of devising, but in the capacity of corporations to take, and it would seem to follow that corporations with power to hold land, such as companies incorporated under the Companies Act, 1862 (25 & 26 Vict. c. 89), might take by devise except so far as objections might arise on the ground of perpetuity. The question is, however, not likely to be of much practical importance; see *Incorp. Soc. v. Richards*, 1 Dr. & War. 258; *Thomson v. Shakespear*, Joh. 612; 1 D. F. & J. 399; *Carne v. Long*, 2 D. F. & J. 75; *Cocks v. Mannors*, 12 Eq. 574; *Chaudière Mining Company v. Desbarats*, L. R. 5 P. C. 277.

A trade union registered under the Trade Union Acts, 1871 and 1876, cannot take land by devise. *In re Amos*; *Carrier v. Price*, (1891) 3 Ch. 159.

2. By the Naturalization Act, 1870 (33 Vict. c. 14) real and personal property of every description, except a British ship, may be taken, acquired, held, or disposed of by an alien in the same manner in all respects as by a natural-born British subject. Chap. XIII.
2. Aliens.

As to what constitutes an alien, see *De Geer v. Stone*, 22 Ch. D. 243.

It has been decided that the Act is not retrospective. And apparently it does not apply to a will made before the passing of the Act, though not coming into operation till afterwards. *Sharp v. St. Sauveur*, 7 Ch. 343.

In cases before the Act land devised to an alien remains in him till office found, when it devolves to the Crown, and this is the case whether the land is devised to trustees or not. *Barrow v. Wadkin*, 24 B. 1; *Sharp v. St. Sauveur*, 7 Ch. 343.

An alien could always take the proceeds of land devised on trust for sale. *Du Hourmelin v. Sheddou*, 1 B. 79; 4 M. & Cr. 525.

3. Formerly personal property vested in a felon after his conviction, during the period of his punishment or before his pardon, was forfeited to the Crown. *Roberts v. Walker*, 1 R. & M. 752. 3. Felons.

But property not vested in a felon till after he had undergone his punishment, or received a pardon, was not forfeited. *Stokes v. Holden*, 1 Kee. 145; *Barnett v. Blake*, 2 Dr. & S. 117; *Gough v. Davies*, 2 K. & J. 623; *Re Thompson's Trusts*, 22 B. 506; *Re Harrington's Trust*, 29 B. 24.

Now, by 33 & 34 Vict. c. 23, forfeiture and escheat for treason, felony, and suicide are abolished; and by sect. 10 all the real and personal property, including choses in action, to which the convict was at the time of his conviction, or shall afterwards become entitled, vests in an administrator appointed under the Act.

By the Civil Procedure Acts Repeal Act, 1879 (42 & 43 Vict. c. 59), sect. 3, outlawry in consequence of any civil proceeding is abolished.

4. By sect. 15 of the Wills Act, a legacy given to an attesting witnesses. 4. Attesting witnesses.

Chap. XIII. witness, or to the husband or wife of an attesting witness, is void.

The subsequent marriage of an attesting witness to a devisee does not avoid the devise. *Thorpe v. Bestwick*, 6 Q. B. D. 311.

A person attesting the signature of two marksmen, witnesses to a will, is himself an attesting witness. *Wigan v. Rowland*, 11 Ha. 157.

But a gift by will to the attesting witness of a codicil is good. *Gurney v. Gurney*, 3 Dr. 208 ; *Re Marcus* ; *Marcus v. Marcus*, 57 L. T. 399.

Where, however, a contingent gift by will is made absolute by a codicil which the legatee attests, and the legatee could only have taken under the codicil, the gift is void. *Gaskin v. Rogers*, L. R. 2 Eq. 284.

And a gift to an attesting witness is void, though there may be a sufficient number of witnesses without him. *Randfield v. Randfield*, 11 W. R. 847, see 8 H. L. 225 ; *Cozens v. Crout*, 21 W. R. 781. See, however, *In bonis Sharman*, 1 P. & D. 661 ; *In bonis Smith*, 15 P. D. 2, and *ante*, p. 30.

Where a solicitor-trustee attests a will, a clause empowering him to charge profit costs is avoided by this section. *In re Barber* ; *Burgess v. Vinnicome*, 31 Ch. D. 665 ; see 34 Ch. D. 77 ; *In re Pooley*, 40 Ch. D. 1.

A gift to a witness attesting the will is good, if the will is afterwards republished by a codicil referring to it. *Anderson v. Anderson*, 13 Eq. 381.

A witness to the will under which a benefit is given him who attests a codicil which confirms the will cannot take under the will. *Re Marcus* ; *Marcus v. Marcus*, 57 L. T. 399.

A gift to an attesting witness as trustee is not void. *Cresswell v. Cresswell*, 6 Eq. 69.

A gift to a trustee upon trusts declared by parol in favour of an attesting witness is void. *In re Fleetwood* ; *Sidgreaves v. Brewer*, 49 L. J. Ch. 514 ; 15 Ch. D. 594.

CHAPTER XIV.

DESCRIPTION—WHAT PASSES UNDER A SPECIFIC
DESCRIPTION.

WITH regard to the question what evidence is admissible for the purpose of discovering to what the terms of description employed by the testator refer, evidence of the testator's intention must be distinguished from evidence of circumstances from which the Court may conclude what the testator's intention must have been. The former evidence is admissible only in rare cases. The latter is generally admissible. Thus :

Chap. XIV.

What evidence is admissible.

1. "All facts relating to the subject matter of the devise, such as that it was or was not in the possession of the testator, the mode of acquiring it, the local situation, and the distribution of the property, are admissible to aid in ascertaining what is meant by the words used in the will." *Doe d. Templeton v. Martin*, 4 B. & Ad. 771, 785, *per Parke, J.*; *Sanford v. Raikes*, 1 Mer. 646.

Surrounding circumstances.

2. Words of art, foreign words, nicknames may be explained by evidence. *Kell v. Charmer*, 23 B. 195; *Goblet v. Beechey*, 3 Sim. 24; 2 R. & My. 624; *Lee v. Pain*, 4 Ha. 251; *Studd v. Cook*, 8 App. C. 577; *Bradford v. Young*, 26 Ch. D. 656; see 29 Ch. D. 617.

Terms of art.

3. Where a word has a meaning in common use, but has a different meaning by local custom, evidence of the custom is admissible. *Shore v. Wilson*, 9 Cl. & F. 545, 566; *Richardson v. Watson*, 1 Nev. & M. 575; *Clayton v. Gregson*, 5 A. & E. 302; *Smith v. Wilson*, 3 B. & Ad. 728; *Anstee v. Nelms*, 1 H. & N. 225.

Evidence of custom.

It has been held that, where a measure is defined by statute, evidence is not admissible to show that the word has a different

Chap. XIV. meaning by custom. *O'Donnell v. O'Donnell*, 1 L. R. Ir. 284; 13 *ib.* 226.

Word with natural meaning but nothing to which it can apply.

4. Where a word has a meaning in ordinary language, but there is nothing to which it can apply, evidence is admissible to show that the testator used the word in a meaning peculiar to himself. The case falls within the second head above mentioned.

Word with natural meaning and something to which it applies.

5. But if the word has a meaning in ordinary language, and there is something to which it applies, evidence is not admissible to show that the testator used it in a different or wider sense, there being no general custom to that effect. *Millard v. Bailey*, L. R. 1 Eq. 378.

Devise of estate by name.

6. If lands are devised by a particular title, evidence is admissible to show what the testator habitually included under the name. *Doe d. Beach v. Lord Jersey*, 3 B. & C. 180; 1 B. & Ald. 554; *Ricketts v. Turquand*, 1 H. L. 472; *Webb v. Byng*, 1 K. & J. 580; *Whitfield v. Langdale*, 1 Ch. D. 61 (devise of Claggetts); *Jennings v. Jennings*, 1 L. R. Ir. 552; see *King v. King*, 13 L. R. Ir. 531.

Devise of estate of or at A.

7. Where a testator devises his estate of A., or at A., and there is an estate answering the description, evidence is not admissible to show in what sense the testator used the expression. *Doe d. Chichester v. Oxenden*, 3 Taunt. 147; 4 Dow. 65; *Doe d. Browne v. Greening*, 3 M. & S. 171.

Patent ambiguity may not be explained.

8. No evidence is admissible to explain a patent ambiguity; for instance, if the testator uses symbols, which on the face of the will require explanation and have no meaning to any one but himself. *Clayton v. Lord Nugent*, 13 M. & W. 206; see *Sullivan v. Sullivan*, 1 R. 4 Eq. 457.

Original will.

9. The Court may look at the original will, as well as the probate. *In re Harrison*; *Turner v. Hellard*, 30 Ch. D. 390.

When the admissible evidence has been taken, the following rules apply to determine to what the words of description used by the testator refer:

Where there is something answering the testator's description that alone passes.

1. *Non accipi debent verba in falsam demonstrationem quæ competunt in limitationem veram.*

Therefore, where there is property, which exactly fits all the terms of the description, the whole of it passes and no more.

Webber v. Stanley, 16 C. B. N. S. 698; *Smith v. Ridgway*, L. R. Chap. XIV. 1 Ex. 331; *In re Seal*; *Seal v. Taylor*, (1894) 1 Ch. 316.

It is immaterial whether the larger words precede or follow the restricting words, provided there is something to which the whole description applies.

Thus, a devise of lands described as in the parish A., and in the occupation of a particular person, will not pass lands not in the occupation of that person. *Doe d. Parkin v. Parkin*, 5 Taunt. 321; *Morrell v. Fisher*, 4 Ex. 591; *Homer v. Homer*, 8 Ch. D. 758. Reference to occupation.

So the general description may be restricted by a reference to the person from whom the testator purchased or derived the land. *Doe d. Tyrrell v. Lyford*, 4 M. & S. 550; *Doe d. Conolly v. Vernon*, 5 East, 51; *Doe d. Harris v. Greathed*, 8 East, 91; *Roe d. Ryall v. Bell*, 8 T. R. 579; *Doe d. Newton v. Taylor*, 7 B. & C. 384; *Emuss v. Smith*, 2 De G. & S. 722; *Cooch v. Walden*, 46 L. J. Ch. 639; see *Corballis v. Corballis*, 9 L. R. Ir. 309. Reference to title of person from whom lands derived.

So a devise of cottages and premises "which I have lately purchased" will not include land belonging to the testator which adjoins the cottages but was not purchased with them. *Cave v. Harris*, 57 L. J. Ch. 62; 57 L. T. 786; 36 W. R. 182.

If the lands are described as being at A. in the county of B., lands not in that county will not pass. *Webber v. Stanley*, 16 C. B. N. S. 698; *Pedley v. Dodds*, 2 Eq. 819. Reference 24 county.

It seems that a devise of lands at A. is not to be limited to lands within the parish of A., but would carry immediately adjoining lands in a neighbouring parish. Devise of lands at A.

This is clearly the case where the devise is of lands at or near A. *Homer v. Homer*, 8 Ch. D. 758. At or near A.

But a devise of lands at A. will not include lands some distance from A. where there are lands to which the description applies. *Attwater v. Attwater*, 18 B. 330; *Doe v. Bower*, 3 B. & Ad. 453; see *Doe d. Dell v. Pigott*, 1 J. B. Moo. 274; 7 Taunt. 552; *Pogson v. Thomas*, 8 Sc. 621; 6 Bing. N. C. 337.

A devise of a manufactory on the west side of a street, with the appurtenances, will not include a manufactory on the east side of the street. *Smith v. Ridgway*, L. R. 1 Ex. 46, 331. Manufactory in a street.

Chap. XIV.

A devise of property in a street may pass the whole of a piece of land which, when purchased by the testator, had a frontage on that street and on another street, though the testator has subsequently divided the land, and built two houses upon it, one abutting on one street and one on the other. *Harman v. Gurner*, 35 B. 478; see, too, *Newton v. Lucas*, 6 Sim. 54; 1 M. & Cr. 391.

Property held
under lease.

A devise of two houses in a street will pass only two houses, though the testator may be possessed of three houses in the street held under the same lease, two of which are comprised in one underlease, and the third in a separate underlease *Tapley v. Eagleton*, 12 Ch. D. 683.

So a devise of certain lands held under a lease where the testator goes on to describe the lands by name passes only such of the lands held under the lease as are named. *West v. Lawday*, 11 H. L. 375.

S. 24 of Wills
Act.

Sect. 24 of the Wills Act enacts that a will is to be construed, with reference to the real and personal estate comprised in it, to speak and take effect as if it had been executed immediately before the death of the testator, unless a contrary intention appears by the will.

Object of
s. 24.

The object of this section was to annul the old rule by which as regards real estate a will was treated as a conveyance and operated only upon real estate, which the testator was entitled to at the date of his will.

The effect of the section is that a will is to be applied to the real and personal estate which the testator has at his death.

But the section does not enact that "we are to construe whatever a man says in his will as if it were made on the day of his death," *per* Lindley, L.J. *In re Portal and Lamb*, 30 Ch. D. 50, p. 55.

The section has in fact no bearing whatever upon the proper construction of a will. A will from its nature is intended to take effect at a future date. A person who makes a will as a rule intends to dispose of everything belonging to him at his death. He does not intend to die intestate as to part. There is now no reason in law why this intention should not be carried into effect. The Court has to inquire what the testator's pro-

perty at his death is, and then to apply the language of the will. It is purely a question of construction whether the language is limited to property belonging to the testator at the date of his will or not, though there is a general probability, from the nature of the instrument, that it is not so limited. Chap. XIV.

Of course in the case of a residuary gift the probability is far greater than in the case of a specific gift, but it is in both cases a question of construction what is intended to pass, and it must not be supposed that this *a priori* probability affords much or any assistance in construing the will.

It has been suggested that under a devise of land with an exception expressed in general terms, for instance, "all my land except that subject to the trusts of a settlement," sect. 24 of the Wills Act does not apply; and that the exception must, as a matter of law, and not of construction, be limited to lands, subject to the settlement at the date of the will. The true view seems to be that the exception will be so limited if that is the proper construction of the will; on the other hand, if the proper construction is that it is intended to include lands subject to the settlement at the date of the death, it will include them. In other words, sect. 24 does not affect the matter either way. *Hughes v. Jones*, 1 H. & M. 765, where upon the construction of the will the exception was limited to lands settled at the date of the will. Whether a
applies to an
exception
from a devise.

A specific devise may be so framed as to be limited to property which the testator owns at the date of the will or it may be so framed as to include any property covered by the description which he owns at his death. Specific devise
may include
after-acquired
property.

Thus under a devise of the Cleeve Court estate, lands acquired since the date of the will and treated by the testator as part of the estate were held to pass. *Castle v. Fox*, 11 Eq. 542; *In re Midland Railway Co.*, 34 B. 525. Devise of
Cleeve Court.

On the other hand, under a devise of "my Quendon Hall Estates," only lands known by that name at the date of the will were held to pass. It was shewn that the expression "Quendon Hall Estates" had in the mind of the testatrix a definite meaning at the date of the will, and there was nothing to show that the meaning had been extended so as to include Quendon Hall
Estates.

Chap. XIV. lands subsequently added to the estate. *Webb v. Byng*, 1 K. & J. 580.

Use of the present tense.

The use of the present tense, for instance, a devise of lands "of which I am seised," though in another gift the testator gives "what I am or at my death shall be possessed of," will not restrict a general devise to property belonging to the testator at the date of the will. *Doe d. York v. Walker*, 12 M. & W. 591; *Lady Langdale v. Briggs*, 3 Sm. & G. 246; 8 D. M. & G. 391; *Hepburn v. Skirving*, 4 Jur. N. S. 651; *Lord Lilford v. Powys Keck* (No. 2), 30 B. 300.

Effect of the word now.

On the other hand, the word "now" used in the description of property refers to the date of the will, and, if it is an essential part of the description, it limits the gift to property then belonging to the testator. *Cole v. Scott*, 1 M. & G. 518; *Hutchinson v. Burrow*, 6 H. & N. 583; *Williams v. Owen*, 2 N. R. 585; *Re Edwards*; *Rowland v. Edwards*, 63 L. T. 481.

If, on the other hand, such words as "now occupied by me" or the like are merely added as an additional description not intended to cut down the generality of the earlier words, the devise will not be restricted to property belonging to the testator at the date of the will. *In re Midland Railway Co.*, 34 B. 525; *Wagstaff v. Wagstaff*, 8 Eq. 229; *In re Ord*; *Dickinson v. Dickinson*, 12 Ch. D. 22; *In re Champion*; *Dudley v. Champion*, (1893) 1 Ch. 101.

Effect of republication by codicil.

Under the old law a codicil to a will had the effect of republishing the will, so that under a general devise in the will or even under a specific devise, if the language was appropriate, after-acquired real estate passed.

Even where the codicil referred only to the land "devised by the will" if it confirmed the will, the effect was held to be the same as if the testator had made a new will at the date of the codicil. *Doe d. York v. Walker*, 12 M. & W. 591; *Lady Langdale v. Briggs*, 3 Sm. & G. 246.

Upon the same principle a codicil made after coverture republishing the will of a married woman made during coverture would make the will effective to pass property which the married woman could not dispose of during coverture, and where a power was conferred on the survivor of husband and

wife exerciseable after the death of one, a will made during the coverture but republished by a codicil after the coverture was held to execute the power. *In re Smith*; *Bilke v. Roper*, 45 Ch. D. 632; *In re Blackburn*; *Smiles v. Blackburn*, 43 Ch. D. 75.

Chap. XIV.

But the effect of the republication of a will by a codicil was a question of construction, and if the codicil referred in terms only to the land devised by the will and did not confirm the will but was only directed to be taken as part of it, the republication did not enlarge the effect of the will. *Bowes v. Bowes*, 2 B. & P. 500; *Hughes v. Turner*, 3 M. & K. 666; *Mompenny v. Bristow*, 2 R. & M. 117.

The principal operation of the rule as to republication was to give effect to the intention by making a will, which on the face of it was intended to include after-acquired real estate effectual to pass it. It cured the infirmity of the will and gave effect to the intention. The effect of republication in cases where the rule is not required for that purpose is a different question. There are some passages in the judgment in *Doe d. York v. Walker* (12 M. & W. 591) which go to show that confirmation of a will by a codicil makes the will speak as if it had been re-executed on the date of the codicil so that "now" would refer, not to the date of the will but to the date of the codicil. It is easy to imagine cases in which this would destroy the testator's intention. The better opinion probably is that it must be ascertained as a question of construction upon all the documents what the effect of republication is. See *In re Champion*; *Dudley v. Champion*, (1893) 1 Ch. 101.

As from what date republished will speaks.

2. *Falsa demonstratio non nocet, cum de corpore constat.*

a. Thus, where an object is sufficiently described, additional words, which have no application to anything, may be rejected. *Blague v. Gold*, Cro. Car. 447, 473; *Doe d. Dunning v. Cranstoun*, 7 M. & W. 1.

Inaccurate description—part inaccurate;

b. Where there is a complete description, and the testator goes on to add words for the purpose of identifying or elaborating the previous description, these words, if inconsistent with the previous description, may be rejected. *Armstrong v. Buck-*

Subordinate description if inaccurate rejected.

Chap. XIV.

land, 18 B. 204; see *Slingsby v. Grainger*, 7 H. L. 273; *Travers v. Blundell*, 6 Ch. D. 436.

Inconsistent
description.

c. Where there is one continuous description, and there is something answering to part of it, and something answering to other part, but the two together are inconsistent, the question is, which are the leading words of description.

In the first class of cases under this head there is no repugnancy between the general terms and the particular super-added description, in the second and third class there is a repugnancy between two parts of a description.

Name
followed by
occupation.

Where the estate is devised by a specific name, followed by a reference to occupation, the reference to occupation may be rejected if the whole estate known by the name is not in the occupation of the person referred to. *Goodtitle d. Radford v. Southern*, 1 M. & S. 299; *Down v. Down*, 7 Taunt. 343; 1 J. B. Moo. 80; see *Doe d. Beach v. Earl of Jersey*, 1 B. & Ald. 550; 3 B. & Cr. 870; *Paul v. Paul*, 1 W. Bl. 255; 2 Burr. 1089; see, too, *Cunningham v. Butler*, 3 Giff. 37; 7 Jur. N. S. 461; *In re Boulter*, 4 Ch. D. 241.

Name
followed by
locality.

Upon similar principles a description by a specific name will prevail over an erroneous reference to a parish or county, or to acreage. *Hardwick v. Hardwick*, 16 Eq. 168; *Whitfield v. Langdale*, 1 Ch. D. 64.

Freehold
farm.

Under a devise of my freehold farm and lands, situate at Edgware, and now in the occupation of A., the whole farm consisting of 50 acres of freehold and 26 acres of copyhold land was held to pass. There was no residuary devise, and there was no reasonable doubt on the will that the whole farm was meant to pass. *In re Bright-Smith; Bright-Smith v. Bright-Smith*, 31 Ch. D. 314; and see the comments there made upon *Stone v. Greening*, 13 Sim. 390; *Hall v. Fisher*, 1 Coll. 47.

Though the estate is not described by a specific name, if the general description contains words which would not be satisfied if the reference to occupation is allowed to restrict the devise, the reference to occupation may be rejected. *White v. Birch*, 36 L. J. Ch. 174; see *Doe d. Parkin v. Parkin*, 5 Taunt. 321.

What are the
leading words.

For the purpose of ascertaining the leading words, it would

seem that where a description is followed by restrictive words inconsistent with it, the earlier words will prevail, especially if the restrictive words are less clear and accurate than the earlier words. Cases *supra* and *Doe d. Remow v. Ashley*, 10 Q. B. 663. Chap. XIV.

Where the more restrictive description of property is followed by a wider description, which would include other property as well, it seems the more restricted description will prevail; for instance, under "my lands in Cokefield, called Hayes Lands," only so much of the Hayes Lands as were in Cokefield passed. *Woodden v. Osbourn*, Cro. El. 674; *Hall v. Fisher*, 1 Coll. 47.

Of course, if the restrictive words can be looked upon as inserted for the purpose of giving the lands carved out of the devise to some one else, they will have their full force. *Higham v. Baker*, Cro. Eliz. 16; *Press v. Parker*, 10 J. B. Moo. 158; 2 Bing. 456.

3. Where there is nothing answering to any part of the description the devise fails. No property answering description.

Thus a devise of lands in a particular county or parish cannot be extended to lands in an adjoining county or parish, though those may be the only lands the testator possessed. *Miller v. Travers*, 8 Bing. 244; *Barber v. Wood*, 4 Ch. D. 885.

4. The same rules are applicable to specific bequests of personal property. Therefore, if there is something which answers fully the words of description, that and that alone will pass. *Slingsby v. Grainger*, 7 H. L. 273; *Ridge v. Newton*, 2 D. & War. 239; *Townend v. Townend*, 1 L. R. Ir. 180. Same rules apply to specific bequests.

5. If the testator gives a certain number of specific things, and is possessed at the date of his death of a larger number, the legatee is entitled to select which he will take. *Hobson v. Blackburn*, 1 M. & K. 571; *Jacques v. Chambers*, 2 Coll. 435; *Millard v. Bailey*, L. R. 1 Eq. 378; *Tapley v. Eagleton*, 12 Ch. D. 683; see *Duckmanton v. Duckmanton*, 5 H. & N. 219; 28 L. J. Ex. 132; *Asten v. Asten*, (1894) 3 Ch. 260. Gift of some out of more.

The principle applies as well to a devise as to a gift of personalty.

It is immaterial whether or not the devise is made in such

Chap. XIV.

words as to show that the testator was aware that he was possessed of more of the things in question than he devises.

For instance, the devisee is entitled to elect whether the devise is of one of my closes called Whiteacre, or of my close called Whiteacre. *Richardson v. Watson*, 4 B. & Ad. 787, is not to be followed; see *Tapley v. Eagleton*, *supra*.

Gift of such parts as legatee selects.

Under a gift of such parts of certain property as a legatee shall signify her desire to possess, the legatee may take the whole, if the property is of such a nature that the legatee might make a selection so as to leave only something of no value. *Arthur v. Mackinnon*, 11 Ch. D. 385.

Probably a gift of such houses as a legatee may select would not entitle the legatee to take all the testator's houses. See, too, *Kennedy v. Kennedy*, 10 Ha. 438.

Increase in value of specific legacy before the testator's death passes to legatee, unless the description excludes it.

6. In the case of a specific bequest, even before the Wills Act, any increase between the date of the will and the death of the testator in the value of the thing specifically given belonged to the legatee. Thus a gift of the amount of a bond carried the accruing interest. *Harcourt v. Morgan*, 2 Kee. 274; *All Souls' Coll. v. Codrington*, 1 P. W. 597.

But if the description of the gift is such as to preclude the possibility of including in it any increase, such increase will not pass, as if the gift be of £300 due to me on a bond, interest will not pass. *Roberts v. Kuffin*, 2 Atk. 112; *Hawley v. Cutts*, 2 Freem. 24.

Inaccurate description.

7. If there is a specific gift, as, for instance, of certain stock, and the testator at the date of his will possessed no such stock, but possessed other stock nearly answering the description, the latter will pass. *Door v. Geary*, 1 Ves. Sen. 255; *Dobson v. Waterman*, 3 Ves. 307 n.; *Gallini v. Noble*, 3 Mer. 691; *Pentecost v. Ley*, 2 J. & W. 207; *Mackinley v. Sison*, 8 Sim. 561; *Sheffield v. Von Donop*, 7 Ha. 42; *Quennell v. Turner*, 13 B. 240; *Ellis v. Eden*, 25 B. 543; *Trinder v. Trinder*, L. R. 1 Eq. 695; *Townend v. Townend*, 1 L. R. Ir. 180; *Palin v. Brookes*, 26 W. R. 877; see *Ex parte Kirk*; *In re Bennett*, 5 Ch. D. 800.

Specific gift of something

8. If a testator makes a specific bequest of something which he has not at the date of the will, evidence is admissible to show

how the mistake arose, and the fact that the thing in question has been exchanged for something else before the date of the will, will not avoid the legacy. In such a case the legatees are entitled to a sum equal in value to the specific legacy at the testator's death. *Selwood v. Mildmay*, 3 Ves. 306; *Lindgren v. Lindgren*, 9 B. 358; *Goodlad v. Barnett*, 1 K. & J. 341. Chap. XIV.

the testator has sold before the date of the will.

9. On the other hand, if the testator makes a specific gift of a thing he thinks he has, but never had, or of a thing which he intends to purchase, but does not, the gift is void. *Waters v. Wood*, 5 De G. & S. 717; *Evans v. Tripp*, 6 Mad. 91; *Millar v. Woodside*, 1 R. 6 Eq. 546. Gift of something the testator thinks he has but has not.

10. If a testator devises a specific thing, such as "my house in Grosvenor Square," and then sells the house and buys another house in Grosvenor Square, there can be little doubt that the latter will not pass. The gift is of a specific thing he has at the date of the will and no other thing will pass. *In re Gibson*; *Mathews v. Foulsham*, L. R. 2 Eq. 669. There are some observations to the contrary in *Castle v. Fox*, 11 Eq. 542, p. 551, which cannot now be considered in accordance with the law. See *In re Portal and Lamb*, 30 Ch. D. 50. Effect of sale of thing specifically given and purchase of similar thing.

11. If the testator sells the specific thing and buys another thing closely resembling the former, the subsequent confirmation of the will by a codicil will not have the effect of passing the fresh acquisition, if the description in the will is not accurately appropriate to it. *Pattison v. Pattison*, 1 M. & K. 12; *Macdonald v. Irvine*, 8 Ch. D. 101; see *Pilkingtton's Trusts*, 6 N. R. 246; and see Chapter XVII. as to Ademption. Confirmation by codicil.

CHAPTER XV.

SPECIFIC, GENERAL, AND DEMONSTRATIVE LEGACIES.

Chap. XV.

General and
specific
legacies dis-
tinguished.

IN the case of bequests of personalty it is often a question of difficulty whether a legacy is general or specific. A general legacy is a legacy not of any particular thing, but of something which is to be provided out of the testator's general estate. If a particular fund is made primarily liable the legacy is demonstrative, but does not fail by the failure of the particular fund. On the other hand, a specific legacy is a gift of a severed or distinguished part of the testator's property. It does not abate till after the general legacies are exhausted, but it is liable to ademption by the testator in his lifetime.

If the legacy is general, the legatee is entitled to have its value paid him out of the estate, but if it is impossible to say what the value is, the legacy fails for uncertainty. *In re Gray; Dresser v. Gray*, 36 Ch. D. 205.

The most common, though not the only kind of specific legacy, is where the testator gives something which he possesses at the date of the will.

In those cases there must be on the face of the will enough to show that the testator is referring to something actually existing at the time.

Legacy of
stock is not
specific.

Thus a mere legacy of stock in round numbers, though the testator may possess the exact amount of stock, is not specific. *Partridge v. Partridge*, 9 Mod. 269; *Ca. t. Talb.* 226; *Simmons v. Vallance*, 4 B. C. C. 345; *Wilson v. Brownsmith*, 9 Ves. 180.

Nor of money
in stock.

Similarly a bequest of 5000*l.* in the South Sea Company's Stock is general, though the testator may have the exact

amount at the date of his will. *Purse v. Snaplin*, 1 Atk. 415; *Bronsdon v. Winter*, Amb. 57; *Bishop of Peterborough v. Mortlock*, 1 B. C. C. 565; *Webster v. Hale*, 8 Ves. 410; *Robinson v. Addison*, 2 B. 515; *Macdonald v. Irvine*, 8 Ch. D. 101; *In re Gray*; *Dresser v. Gray*, 36 Ch. D. 205; see *Page v. Young*, 19 Eq. 501, where a gift of "the interest of 4500*l.*, money in the funds," was held specific.

Chap. XV.

As to whether the gift is of so much money to be invested in stock, or of stock of that value, see *Allan v. Kelly*, 7 W. R. 139.

But though the actual gift may not contain anything to show that it is specific, it may appear from the rest of the will that it is so.

A direction to transfer a certain amount of stock, or to pay it as soon as possible, will not make the legacy specific. *Sibley v. Perry*, 7 Ves. 522, 529; *Webster v. Hale*, 8 Ves. 410.

Nor of stock to be transferred.

But a gift of stock generally to trustees on trust to sell, shows that the testator referred to specific stock. *Ashton v. Ashton*, Ca. t. Talb. 152; 3 P. W. 384.

Gift on trust to sell is specific.

So where a testator, having given legacies of stock generally, then gives the rest of the stock "standing in my name," the earlier legacies must be specific. *Sleech v. Thorington*, 2 Ves. Sen. 560; see *Millard v. Bailey*, L. R. 1 Eq. 378.

Gift of rest of my stock makes previous gifts of stock specific.

A direction that if the testator should not have sufficient stock standing in his name to answer the legacies of stock previously given, the executors should purchase sufficient to make up the deficiency, shows that the testator meant to give something in existence at the time. *Townsend v. Martin*, 7 Ha. 471; *Fountaine v. Tyler*, 9 Pr. 94; *Queen's Coll. v. Sutton*, 12 Sim. 521.

Direction to purchase if the testator should not have sufficient stock to answer legacies of stock previously given.

The same is the case with a gift of 4000*l.*, capital stock, in the 3 per cent. Consolidated Bank Annuities, "or in whatsoever of the Government funds the same should be found invested." *Hosking v. Nicholls*, 1 Y. & C. C. 478.

If the legacy is not of stock in round numbers, but, for instance, of 2702*l.* 3*s.* Bank Annuities, and the testator has the exact amount, it would seem the argument in favour of specific

Legacy of stock not in round numbers where

- Chap. XV.** gift is much stronger. *Jeffreys v. Jeffreys*, 3 Atk. 120; see *Robinson v. Addison*, 2 B. 515.
- the testator has the exact amount. A gift of "my" stock is specific. *Ashburner v. Macguire*, 2 B. C. C. 108; *Miller v. Little*, 2 B. 259.
- Gift of "my" stock. The effect of the Wills Act upon such a gift is to leave it specific, though it includes all the stock of the particular description belonging to the testator at his death. *Lady Langdale v. Briggs*, 8 D. M. & G. 391; *Trinder v. Trinder*, L. R. 1 Eq. 695; *Bothamley v. Sherson*, 20 Eq. 304.
- Effect of Wills Act. It will not include stock which the testator has directed his brokers to purchase, but which is not in fact purchased till after his death. *Thomas v. Thomas*, 27 B. 537.
- Gift of part of specific fund. A gift of a part of a specific fund is specific. *Ford v. Fleming*, 1 Eq. Ca. Ab. 302, pl. 3; 2 P. W. 469; *Nelson v. Carter*, 5 Sim. 530; *Oliver v. Oliver*, 11 Eq. 506; *McClellan v. Clark*, 50 L. T. 616.
- So, too, a gift of a specific thing to be sold and divided in definite shares among several persons is a gift of specific legacies. *Page v. Leapingwell*, 18 Ves. 463; *Jeffrey's Trusts*, L. R. 2 Eq. 68.
- Gift of money out of money. Similarly, a gift of money "out of" specific money, or of stock "out of" specific stock, is specific; as, for instance, money out of the dividends of stock, or money out of money invested in stock. *Drinkwater v. Falconer*, 2 Ves. Sen. 623; *Morley v. Bird*, 3 Ves. 628; *Hosking v. Nicholls*, 1 Y. & C. C. 478; *Badrick v. Stevens*, 3 B. C. C. 431; *Mullins v. Smith*, 1 Dr. & Sm. 204.
- Money out of stock. On the other hand, a gift of money out of stock is not specific, but demonstrative. *Kirby v. Potter*, 4 Ves. 748; *Deane v. Test*, 9 Ves. 146.
- Independent gift followed by a direction to pay out of a certain fund. If there is an independent gift of money, followed by a direction to pay it out of certain specific moneys, the legacy is demonstrative. *Roberts v. Pocock*, 4 Ves. 150; *Acton v. Acton*, 1 Mer. 178.
- Similarly, a gift of "5000*l.* or 50,000 rupees now vested in Company's bonds" is demonstrative. *Gillaume v. Adderley*, 15 Ves. 384.
- Gift of 100*l.* Where the gift is not "out of" but "of" only, as 100*l.* of my

funded property, it is more difficult to decide under which of the two last heads the gift falls. It seems, however, that if the testator estimates his stock in money, a gift of 100*l.* of my stock is specific. *Davies v. Fowler*, 16 Eq. 308; see *Brennan v. Brennan*, 1. R. 2 Eq. 321. Chap. XV.
of my funded
property.

But if he does not, and gives merely a gift of 100*l.* of my funded property, it is equivalent to a gift of money out of stock, and is therefore not specific. *Lambert v. Lambert*, 11 Ves. 607.

In some cases a difficulty may arise whether the testator meant money out of money or money out of stock. Whether a
gift is of
money out of
money or of
money out of
stock.

It is clear that a gift of "2000*l.* Long Annuities now standing in my name" is specific, though the testator may only have had a much smaller sum. *Gordon v. Duff*, 28 B. 519; 3 D. F. & J. 662.

Whether it is a gift of Long Annuities to the amount of 2000*l.* a year or of 2000*l.* in gross seems doubtful, but probably this would depend on the state of the testator's property.

But if the gift is of "50*l.* of Bank Long Annuities Stock standing in my name," as such stock has no existence, and the gift might equally well be of a lump sum of 50*l.*, or of 50*l.* per annum, it is necessary to refer to the state of the testator's property to discover what he may have meant, and whether the gift is of 50*l.* per annum Long Annuities, or of the sum of 50*l.* to be paid out of Long Annuities. If the property is insufficient to satisfy the legacies, if construed as legacies of so much per annum Long Annuities, the legacies will be demonstrative legacies of so much money out of Long Annuities. *Boys v. Williams*, 3 Sim. 563; 2 R. & M. 688. See *A.-G. v. Grote*, 3 Mer. 316; 2 R. & M. 699; *Colpoys v. Colpoys*, Jac. 451, and *Fonnereau v. Poyntz*, 1 B. C. C. 471, as explained by Lord Eldon, 6 Ves. 400.

It has been said that a specific legacy must be liable to ademption, and that therefore there could not be a specific legacy of a thing which the testator had not at the date of the will. See *Parrott v. Worsfold*, 1 J. & W. 594. Legacy may
be specific yet
not subject to
ademption.

But it is now clear that a testator may make a specific gift of a thing of which he contemplates the acquisition, as, for

Chap. XV.

Whether a
gift of a sum
"invested"
in a particular
way is specific.

instance, of the stock he may die possessed of. *Fountainne v. Tyler*, 9 Pr. 94; *Stewart v. Denton*, 4 Dougl. 219; 2 Chitty, 456; *Stephenson v. Dowson*, 3 B. 342; *Queen's Coll. v. Sutton*, 12 Sim. 521.

Whether the gift of a sum "invested" in a particular way is specific or not, depends on the question whether the testator meant the legatee to have the sum however invested, or whether the actual investment is the important part of the description.

Thus, a gift of "the" 7000*l.* out on mortgage is clearly specific. *Gardner v. Hatton*, 6 Sim. 93.

A bequest of a sum of money described as "now" invested in a certain way is specific. *Harrison v. Jackson*, 7 Ch. D. 339 (where *Le Grice v. Finch*, 3 Mer. 50, is disapproved); *McClellan v. Clark*, 50 L. T. 616; *Re Robe*; *Slade v. Walpole*, 61 L. T. 497. See *Sparrow v. Josselyn*, 16 B. 135.

A gift of "3000*l.* invested in Indian security" has upon the general language of the will been held to be demonstrative. *Mytton v. Mytton*, 19 Eq. 30; see *Bevan v. A.-G.*, 4 Giff. 361; 2 N. R. 52; *McClellan v. Clark*, 50 L. T. 616; *In re Pratt*; *Pratt v. Pratt*, (1894) 1 Ch. 491.

But if the gift is of 300*l.*, or *thereabouts*, invested by the testatrix in a certain way, the words "or thereabouts" show that the investment is the important part of the gift. *Kermode v. Macdonald*, L. R. 1 Eq. 457; *ib.* 3 Ch. 584.

The following gifts have been held to be specific:

Examples of
specific gifts.

A gift of a particular debt, or of the money due on a particular security; as, for instance, of "my mortgage," or "the money now owing to me from A." *Innes v. Johnson*, 4 Ves. 568; *Sidebotham v. Watson*, 11 Ha. 170; *Ellis v. Walker*, Amb. 309; *Smallman v. Goolden*, 1 Cox, 329; *Gardner v. Hatton*, 6 Sim. 93; *Re Bridle*, 4 C. P. D. 336; see *Sidney v. Sidney*, 17 Eq. 65.

A gift of the interest of money on a particular security. *Ashburner v. Macguire*, 2 B. C. C. 108.

A gift of a sum of money "which" is secured in a particular way. *Chaworth v. Beech*, 4 Ves. 556; *Gillaume v. Adderley*, 15 Ves. 384; *Davies v. Morgan*, 1 B. 405.

A gift of money described as "being" on a particular security. Chap. XV.
Nelson v. Carter, 5 Sim. 530; *Ford v. Fleming*, 2 P. W. 469;
 1 Eq. Ca. Ab. 302, pl. 3. See *Sparrow v. Josselyn*, 16 B. 135;
Smith v. Pybus, 9 Ves. 566.

A legacy directed to be paid out of the amount of a debt due to the testator is a demonstrative legacy. *Vickers v. Pound*, 6 W. R. 580; 4 Jur. N. S. 543; 6 H. L. 885.

Upon the question whether legacies given in supposed exercise of a power which the testator cannot exercise are specific, see *Legacies in exercise of power.*
Walker v. Laxton, 1 Y. & J. 557; *Re Young*; *Trye v. Sullivan*, 52 L. T. 754.

WHETHER A GIFT IS OF A SPECIFIC OR AN ALIQUOT PART OF FUND.

A gift of a definite sum, part of a specific fund, is *prima facie* a gift of that precise sum, whether the fund turns out more or less, and not of an aliquot part of the fund. *Smith v. Fitzgerald*, 3 V. & B. 2; *Booth v. Alington*, 6 D. M. & G. 613. See *Eales v. Drake*, 1 Ch. D. 217; *In re Tunno*; *Raikes v. Raikes*, 45 Ch. D. 66. Whether a gift is of a specific or aliquot part of a fund.

The testator may, however, show an intention that the legatees were to take aliquot parts of the fund. See *Chambers v. Chambers*, Mos. 333; *Cordell v. Noden*, 2 Vern. 148.

Upon similar principles, where a fund subject to a special power is appointed to objects and non-objects, the objects take only the shares they would have taken supposing the whole appointment good, and the rest goes as in default of appointment. *In re Farncombe's Trusts*, 9 Ch. D. 652.

LEGACIES CONNECTED WITH LAND.

A devise of lands, whether by specific description or by residuary devise, is specific. *Hensman v. Fryer*, L. R. 3 Ch. 420; *Lancefield v. Iggulden*, 10 Ch. 136. Devise of land is specific whether residuary or not.

A devise of land to be sold and divided among certain persons makes them specific legatees. *Page v. Leapingwell*, 18 Ves. 463; *Newbold v. Roadknight*, 1 R. & M. 677. Devise on trust to sell and divide.

- Chap. XV.** The gift of a rent-charge or annuity to be paid out of land with powers of distress is specific. *Long v. Short*, 1 P. W. 403; *Davenhill v. Fletcher*, Amb. 244; *Creed v. Creed*, 11 C. & F. 491; *Patching v. Barnett*, 51 L. J. Ch. 74. See *Poole v. Heron*, 42 L. J. Ch. 348.
- Gift of rent-charge.**
- But a mere gift of an annual sum or of a legacy to be paid out of real estate, will not be specific. *Mann v. Copland*, 2 Mad. 223; *Fowler v. Willoughby*, 2 S. & St. 354; *Colville v. Middleton*, 3 B. 570.
- Of annual sum to be paid out of land.**
- Nor will a gift of a legacy or an annuity with a mere charge on land be specific. *Willox v. Rhodes*, 2 Russ. 452; *Davies v. Ashford*, 15 Sim. 42; *Paget v. Huish*, 1 H. & M. 663.
- Legacy with mere charge on land.**
- But a trust to raise a sum of money out of land, which sum is then given, is a specific legacy. *Welby v. Rockcliffe*, 1 R. & M. 571; *Dickin v. Edwards*, 4 Ha. 273.
- Trust to raise a sum out of land.**
- So, too, a direction to pay a sum out of land, the only gift being in the direction to pay, is specific. *Spurway v. Glyn*, 9 Ves. 483.
- Effect of directions in the will on legacies in themselves specific.**
- In such a case the fact that the personalty is given after payment of legacies will not make the gift of a sum out of the proceeds of sale of realty demonstrative. *Rickets v. Ladley*, 3 Russ. 418.
- Though, on the other hand, where a testatrix gave her real and personal estate on trust to pay the legacies thereafter given, a subsequent gift out of the proceeds of sale of realty was held demonstrative. *Hodges v. Grant*, 4 Eq. 140.
- And where a legacy was given out of a fund which was not available till the death of A., but there was a direction that it was to be paid with the other legacies, it was held demonstrative. *Williams v. Hughes*, 24 B. 474.

WHETHER A GIFT IS SPECIFIC OR RESIDUARY.

- Whether a gift is specific or residuary.**
- A gift of the whole of the testator's personal estate may be specific. *Powell v. Riley*, 12 Eq. 175; *Roffey v. Early*, 42 L. J. Ch. 472. And the fact that the testator provides another fund for payment of debts affords a strong argument that the per-

sonal estate was intended to be specifically given. See the cases cited under the head of Exoneration of Personalty.

But where a testator, after directing his executors to pay his debts, and giving legacies, gave all his personal estate to A., with certain exceptions, and gave the residue of his estate to his executors on certain trusts, the gift of the personalty was held not to be specific. *Robertson v. Broadbent*, 8 App. C. 812.

A mere enumeration of specific things in a residuary bequest will not make the gift of those things specific. *Taylor v. Taylor*, 6 Sim. 246; *Sutherland v. Cooke*, 1 Coll. 498; *Fielding v. Preston*, 1 De G. & J. 438. Enumeration of specific things.

The cases in which it has been held that as between tenant for life and remainderman of a residue the fact of specific enumeration of certain things is a strong argument in favour of specific enjoyment by the former, are no authorities on the question whether the gift of those things is specific in the sense here discussed, though where the tenant for life has not been held entitled to specific enjoyment, the things specially mentioned are *à fortiori* not specific legacies. See this distinction well illustrated in *Fielding v. Preston*, 1 De G. & J. 438; see *post*, p. 443.

A direction that certain funds are in certain events to fall into the residue will not make the gift of those funds specific. *Lynes' Estate*, 8 Eq. 482.

A gift of residue including certain specified property will not make the gift of that property specific. *In re Tootal's Estate*, 2 Ch. D. 628; *Macdonald v. Irvine*, 8 Ch. D. 101.

And a gift of the residue of a specific fund and all other the residue of the estate is not a specific gift of the residue of the fund. *In re Green*; *Baldock v. Green*, 40 Ch. D. 610.

If the specific things enumerated in the residuary gift are distinguished from the residue by such words as "as well as," or "together with," or "and also," the gift of them is specific. *Clarke v. Butler*, 1 Mer. 304; *Hill v. Hill*, 11 Jur. N. S. 806; *Langdale v. Esmonde*, 1 R. 4 Eq. 576; *Fitzwilliams v. Kelly*, 10 Ha. 266. Effect of words "as well as," "together with," &c.

Possibly if the enumeration of specific things comes after the

Chap. XV.

gift of the residue, the same result may follow. *Bethune v. Kennedy*, 1 M. & Cr. 114; *Mills v. Brown*, 21 B. 1.

On the other hand, a residue given "together with" certain specified property will not make the gift of that property specific, if its mention can be accounted for on the ground that the testator wished to except it from another gift in the will. *Fairer v. Park*, 3 Ch. D. 309.

The subject of residuary gifts will be found discussed in Ch. XIX.

WHETHER A GIFT OF THE REST OR RESIDUE OF A SPECIFIED FUND IS SPECIFIC.

Whether a gift of the residue of a fund is specific.

When a testator disposes of parts of a specific fund, which he estimates at a certain amount, and then disposes of the residue, and the fund turns out to be less than the estimated amount, the question arises whether the gift of residue was intended to be specific or not. In the former case, all the beneficiaries abate proportionately; in the latter, the loss must, in the first instance, be borne by the residuary legatee.

Where a testator gives the residue of a specific fund, and estimates that residue in money, the gift of the residue is specific. *Haslewood v. Green*, 28 B. 1; *Walpole v. Apthorp*, 4 Eq. 37.

So, too, where a testator estimates a specific fund in money, and gives definite portions of it, a gift of the rest is as specific as if he had stated it in figures. *Page v. Leapingwell*, 18 Ves. 463; *Walpole v. Apthorp*, 4 Eq. 37; *Miller v. Huddleston*, 6 Eq. 65; *Elwes v. Causton*, 30 B. 554; *Wright v. Weston*, 26 B. 429; see *Fee v. M'Manus*, 15 L. R. Ir. 31; *In re Doane*, 10 Times L. R. 100; *In re Tunno*; *Raikes v. Raikes*, 45 Ch. D. 66.

But if the fund is given subject to debts, the gift of the residue will not be specific. *Harley v. Moon*, 1 Dr. & S. 623; *Baker v. Farmer*, 3 Ch. 537.

So, too, though the testator estimates the fund in money, if the residue is given subject to or after payment of specific gifts, the gift of the residue is not specific, but will carry everything

undisposed of, by reason of lapse or otherwise. *Carter v. Taggart*, 16 Sim. 423; *Harries' Trust*, Jo. 199; but see *Miller v. Huddleston*, 6 Eq. 65. Chap. XV.

So, if the fund is estimated in figures, but the testator shows that he considers it fluctuating in amount by adding "or other the stock, funds, or securities of which the same may for the time being consist," the gift of the residue is not specific. *De Lisle v. Hodges*, 17 Eq. 440.

And though the fund is in fact definite in amount, if the testator merely describes it generally, without estimating it in figures, the gift of the residue is not specific. *Petre v. Petre*, 14 B. 197; *Vivian v. Mortlock*, 21 B. 252.

A gift of the residue of policy moneys following gifts of certain sums out of the policy moneys has been held to pass bonuses on the policy. *Corballis v. Corballis*, 9 L. R. Ir. 309.

See the chapter on Residuary Bequests, p. 191.

CHAPTER XVI.

CUMULATIVE AND SUBSTITUTIONAL LEGACIES.

Chap. XVI.

Legacies by
same instru-
ment of equal
amount;

I. LEGACIES of equal amount given by the same instrument are merely repetitions. *Holford v. Wood*, 4 Ves. 75; *Manning v. Thesiger*, 3 M. & K. 29; *Brine v. Ferrier*, 7 Sim. 549; *Early v. Benbow*, 2 Coll. 342; *Early v. Middleton*, 14 B. 453.

But there may be an intention to give both. *Barkenshaw v. Hodge*, 22 W. R. 484, where the gift was to trustees, and the legacies were introduced by the words "upon trust to pay," and "upon further trust to pay," &c.

Parol evidence would be admissible to show that the testator meant the legatee to have both legacies, such evidence being in support of the *primâ facie* meaning of the instrument. See *Hurst v. Beach*, 5 Mad. 351; *Hall v. Hill*, 1 Dr. & War. 94.

of unequal
amount.

If the legacies are not equal the legatee is entitled to both. *Yockney v. Hansard*, 3 Ha. 622; *Curry v. Pile*, 2 B. C. C. 225; *Baylee v. Quin*, 2 Dr. & War. 116; *Adnam v. Cole*, 6 B. 353.

The rules with regard to cumulative legacies do not apply to the case of a pecuniary gift and a residue given to the same person. In such a case [the legatee is entitled to both. *Kirkpatrick v. Bedford*, 4 App. C. 96.

Legacies by
different
instruments.

II. Legacies of equal, less, or greater amount, given by different instruments, as by will and codicil, to the same person, are *primâ facie* cumulative. *Hooley v. Hatton*, 1 B. C. C. 390 n.; *Lee v. Pain*, 4 Ha. 201, 216; *Roch v. Cullen*, 6 Ha. 531; *Cresswell v. Cresswell*, 6 Eq. 69; *Wilson v. O'Leary*, 12 Eq. 525; 7 Ch. 448; *Walsh v. Walsh*, 1 R. 4 Eq. 396; *In re Armstrong*; *Mayne v. Woodward*, 31 L. R. Ir. 154.

Bequests of a share of residue by will and of a pecuniary legacy by a codicil are, of course, cumulative. *Gordon v. Anderson*, 4 Jur. N. S. 1097; *Ledger v. Hooker*, 18 Jur. 481.

It makes no difference that the codicil recites the gift by will. *Guy v. Sharp*, 1 M. & K. 589.

The fact that some legacies in the codicil are expressed to be in addition affords an argument that the others are substitutional, but is not conclusive. *Hooley v. Hatton*, 1 B. C. C. 390 n.; *Allen v. Callow*, 3 Ves. 289; *Mackenzie v. Mackenzie*, 2 Russ. 272; *Wray v. Field*, 2 Russ. 257; 6 Mad. 300; *Barclay v. Wainwright*, 3 Ves. 462.

The fact that a legacy given by a codicil is expressed to be in addition to a legacy given by the will does not show that it is not also in addition to a legacy by a prior codicil. *Spire v. Smith*, 1 B. 419; *Watson v. Reed*, 5 Sim. 431; see *Sawrey v. Rumney*, 5 De G. & S. 698.

III. It may, however, appear that the gift by the later instrument is intended to be substitutional. This may be shown :

Legacies by different instruments will be substitutional—

1. By the form of the second instrument.

a. If the instrument by which the second gift is made is not a codicil, but is described as a last will and testament, the presumption is strong that it was intended to be in substitution so far as it goes for the prior instrument. *Jackson v. Jackson*, 2 Cox, 35; *Kidd v. North*, 14 Sim. 463; 2 Ph. 91; *Tuckey v. Henderson*, 33 B. 174.

if the instruments themselves are substitutional,

b. If the additional instrument recites that the testator has not time to alter his will, legacies given by it will be substitutional. *Russell v. Dickson*, 4 H. L. 293.

c. If the additional instrument is treated as explanatory of and to be incorporated into the will, the case may be brought within the rule as to additional gifts in the same instrument. *Duke of St. Albans v. Beauclerk*, 2 Atk. 636; *Fraser v. Byng*, 1 R. & M. 90.

And in the same way several testamentary papers may be so connected together as to be in fact one instrument. *Brine v. Ferrier*, 7 Sim. 549.

The same will be the case where there is a gift to a person

Chap. XVI.

or mere
repetitions of
each other,

if the terms
of the second
gift show that
it was meant
to be substi-
tutional.

with a different gift written in the margin of the will. *Martin v. Drinkwater*, 2 B. 215.

2. From the contents of the second paper.

For instance, where the second instrument is not a codicil but a testamentary paper, and in effect makes the same dispositions as a prior testamentary paper. *Gillespie v. Alexander*, 2 S. & St. 145; *A.-G. v. Harley*, 4 Mad. 263; *Hemming v. Gurney*, 2 S. & St. 311; 1 Bl. N. S. 479.

So one codicil may appear to be a mere repetition of another. If, for instance, both are of the same date and contain the same provisions in all respects. *Whyte v. Whyte*, 17 Eq. 50.

So if, though not of the same date, the legatees are the same, and certain specific legacies, as well as the residue, are given by both. *Duke of St. Albans v. Beauclerk*, 2 Atk. 636; see *Coote v. Boyd*, 2 B. C. C. 521; *Campbell v. Earl of Radnor*, 1 B. C. C. 271; *Roxburgh v. Fuller*, 13 W. R. 39.

Evidence is admissible to show that two codicils of different dates, but containing the same dispositions, were executed only as duplicates. *Hubbard v. Alexander*, 3 Ch. D. 738.

3. It may appear from the character of the second gift itself that it is meant to be substitutional:

a. If the second gift only adapts the bounty to circumstances that have happened; as, for instance, the death of prior legatees. *Barclay v. Wainwright*, 3 Ves. 462; *Allen v. Callow*, 3 Ves. 289; *Osborne v. Duke of Leeds*, 5 Ves. 369.

b. If the second gift can be looked upon as explanatory of the prior gift. *Moggridge v. Thackwell*, 1 Ves. Jun. 473.

c. If by a codicil the testator revokes a portion of a prior gift, and then repeats the rest, so that the repetition may be explained as *ex abundanti cautela*. *Benyon v. Benyon*, 17 Ves. 34; *Hinchcliffe v. Hinchcliffe*, 2 Dr. & S. 96.

d. If the second gift is coupled with a gift of some specific thing already given, this shows it to be substitutional. *Currie v. Pye*, 17 Ves. 462; see *Lord Mayor of London v. Russell*, Finch, 290; explained 6 Ir. Ch. 131.

e. And generally it seems that the difference in the way in which the two gifts are given is in favour of their being cumu-

lative. *Hodges v. Peacock*, 3 Ves. 735 ; *Lee v. Pain*, 4 Ha. 201. Though, on the other hand, if the two gifts are of the same amount, but given to different trustees, the argument is the other way. *Benyon v. Benyon*, 17 Ves. 34.

f. The testator may show by a reference to a gift in one codicil as a sufficient provision that the gift so given was all the legatee was intended to have. *Robley v. Robley*, 2 B. 95.

g. The presumption that two legacies given by two codicils are cumulative is rebutted by the fact that both are expressed to be in substitution for a legacy given by the will. *In re Armstrong* ; *Mayne v. Woodward*, 31 L. R. Ir. 154.

IV. Gifts by different instruments of the same amount and expressed to be given from the same motive are substitutional. *Benyon v. Benyon*, 17 Ves. 34.

Gifts of the same amount given from the same motive are substitutional.

It must, however, be clear that the testator is expressing a motive and not merely giving a description ; thus, in the case of gifts of equal amount to a "servant," the term servant is merely descriptive. *Roch v. Cullen*, 6 Ha. 531 ; *Suisse v. Lowther*, 2 Ha. 424 ; *Wilson v. O'Leary*, 12 Eq. 522 ; 7 Ch. 448.

If, however, the gifts are not of the same amount they are cumulative. *Hurst v. Beach*, 5 Mad. 352.

V. Additional legacies are subject to the same incidents as the original legacy.

Additional and substitutional gifts are subject to the same incidents as the original gift.

A gift in addition to or in lieu of a previous gift to the same legatee is subject to the same conditions as the previous gift with respect to vesting, separate estate, the fund out of which it is payable, freedom from legacy duty, and provisions against lapse. *Leacroft v. Maynard*, 1 Ves. Jun. 279 ; 3 B. C. C. 233 ; *Crowder v. Clowes*, 2 Ves. Jun. 449 ; *Day v. Croft*, 4 B. 561 ; *Duncan v. Duncan*, 27 B. 392 ; *Earl of Shaftesbury v. Duke of Marlborough*, 7 Sim. 237 ; *Bristow v. Bristow*, 5 B. 289 ; *Cooper v. Day*, 3 Mer. 154 ; *Fisher v. Brierley*, 30 B. 265 ; *In re Wight* ; *Knowles v. Sadler*, W. N. 1879, 20 ; *In re Boddington* ; *Boddington v. Clairat*, 25 Ch. D. 685 ; *In re Benyon* ; *Benyon v. Grieve*, W. N. 1884, 157.

It makes no difference that the legacy is not expressed to be in addition to the previous gift (a), or that the substituted legacy is in part payable out of a different fund (b). *Johnson*

Chap. XVI. *v. Lord Harrowby*, Johns. 425 ; 1 D. F. & J. 183 (a) ; *Re Colyer* ; *Millikin v. Snelling*, 55 L. T. 344 (b).

The rule does not apply where a legacy is given to a person in lieu of a legacy to another legatee who has pre-deceased the testator. *Chatteris v. Young*, 2 Russ. 184.

Nor does it apply where the condition in question is limited by the will to legacies "hereinafter" given, and the additional legacy is given by a codicil. *Bonner v. Bonner*, 13 Ves. 379 ; *Strong v. Ingram*, 6 Sim. 197.

It is not quite clear whether an additional or substitutional gift will be subject to the same executory gifts over as the original gift ; it seems, however, that it will not. *Crowder v. Clowes*, 2 Ves. Jun. 449 ; *Alexander v. Alexander*, 5 B. 518 ; see *Donnellan v. O'Neill*, I. R. 5 Eq. 523.

An additional legacy given in terms which would give an absolute interest is not subject to limitations of the prior gift, which would cut it down to a life interest. *Haley v. Bannister*, 23 B. 336 ; *Mores' Trust*, 10 Ha. 171 ; *Mann v. Fuller, Kay*, 624 ; *Hill v. Jones*, 37 L. J. Ch. 465 ; see *Cookson v. Hancock*, 2 M. & Cr. 606 ; *Hargreaves v. Pennington*, 12 W. R. 1047.

CHAPTER XVII.

THE INCIDENTS ATTACHING TO SPECIFIC AND GENERAL
LEGACIES.

I. ADEMPMENT.

A SPECIFIC legacy is adeemed if it is afterwards converted by the testator into something else. *Ashburner v. Macquire*, 2 B. C. C. 108; *Manton v. Tabois*, 30 Ch. D. 92.

Chap. XVII.

A specific legacy is adeemed if converted by the testator,

The conversion must be complete in the lifetime of the testator. A direction to sell not carried out till after the testator's death will not effect ademption. *Harrison v. Asher*, 2 De G. & S. 436.

A specific gift of leaseholds is not adeemed if the testator enters into a contract to sell them, which is not enforceable against him. *Crowe v. Menton*, 28 L. R. Ir. 519; see *In re Pearce*; *Roberts v. Stephens*, 8 Mews' R. 805.

As to what amounts to a conversion, see *post*, p. 218.

A charge upon a specific bequest is gone if the specific bequest is adeemed. *Couper v. Mantell*, 22 B. 223.

To effect ademption it is not necessary that the conversion should be the act of the testator. It is sufficient if the property is converted by some duly constituted authority. *Shaftsbury v. Shaftsbury*, 2 Ver. 747; *Jones v. Green*, 5 Eq. 555; *In re Freer*; *Freer v. Freer*, 22 Ch. D. 622. See *A.-G. v. Marquis of Ailesbury*, 12 App. C. 672.

or a proper authority,

Having regard to the provisions of sect. 123 of the Lunacy Act, 1890 (53 Vict. c. 5), which is not, like sect. 119 of the Lunacy Regulation Act (16 & 17 Vict. c. 70), limited to land, it is probable that a sale under an order in lunacy would not adeem a specific legacy so far as the proceeds remain unapplied at the lunatic's death.

Chap. XVII.

or even *vis major*.

Destruction of the property by *vis major*, such as the loss of a ship, adeems the gift. *Durrant v. Friend*, 5 De G. & S. 343.

But not by improper conversion.

There will be no ademption where the specific thing has been converted without authority. *Basan v. Brandon*, 8 Sim. 171; *Taylor v. Taylor*, 10 Ha. 475; *Jenkins v. Jones*, L. R. 2 Eq. 323; see *Browne v. Groombridge*, 4 Mad. 495; *In re Larking*; *Larking v. Larking*, 37 Ch. D. 310.

A gift of specific stock standing in the names of trustees is adeemed by a change of investment. *Harrison v. Jackson*, 7 Ch. D. 339.

Mere transfer from trustees to testator will not adeem.

But a mere transfer of a thing specifically given from trustees to the testator will not be an ademption. *Dingwell v. Askew*, 1 Cox, 427; see *Amb. 260*; 3 B. C. C. 416; *Clough v. Clough*, 3 M. & K. 296; *Jones v. Southall*, 32 B. 31.

And a transfer of consols into Court to the credit of a lunatic does not adeem a gift of consols described as "standing in my name and belonging to me." *In re Wood*; *Anderson v. London City Mission*, (1894) 2 Ch. 577.

Nor will a formal change.

A change which leaves the thing to all intents the same as it was before does not effect ademption, as, for instance, the conversion of shares into stock by a resolution of the company. *Oakes v. Oakes*, 9 Ha. 666; *Pilkington's Trusts*, 6 N. R. 246; *In re Loveman*; *Watson v. Watson*, W. N. 1879, 95; see *Partridge v. Partridge*, Cas. t. Talb. 226; *In re Lane, Luard v. Lane*, 14 Ch. D. 856; see *Longfield v. Bantry*, 15 L. R. Ir. 101; *In re Howell-Shepherd*; *Churchill v. St. George's Hospital*, (1894) 3 Ch. 649.

Bequests of share under will.

Upon the question whether a bequest of a share, to which the testator is entitled under the will of another person, would be adeemed if the share is paid to the testator after the date of his will, it seems that if the testator describes the share in such words as to show that he intends to give only a chose in action, the gift will be adeemed by the receipt of the share. See *Harrison v. Jackson*, 7 Ch. D. 339, where *Clark v. Browne*, 2 Sm. & G. 524, is disapproved. See *Manton v. Tabois*, 30 Ch. D. 92.

On the other hand, if the description employed by the testator

does not refer to the share as a chose in action, the gift will not be adeemed, merely because the testator has received the share, if he invests it and keeps it apart from the rest of his property. *Lee v. Lee*, 27 L. J. Ch. 824; *Morgan v. Thomas*, 6 Ch. D. 176; see *Moore v. Moore*, 29 B. 496; *Re Kenyon's Estate*; *Mann v. Knapp*, 56 L. T. 626.

And it would seem that a bequest of certain trust funds "and the securities upon which they may be invested" would not be adeemed by a mere change of security, though it will if the testator receives the money and lends it on security for his own purposes. *Jones v. Southall*, 32 B. 31.

Where the donee of a general power appoints a fund of personality by a specific description the appointment is not adeemed by a subsequent change of investment. *In re Johnstone's Settlement*, 14 Ch. D. 162; *Willett v. Finlay*, 29 L. R. Ir. 156, 497.

On the other hand, an appointment of land under a general power in a settlement is adeemed if the land is afterwards sold under a power of sale exercisable with the testator's consent. *Gale v. Gale*, 21 B. 349; *Blake v. Blake*, 15 Ch. D. 481.

The confirmation of a will by a codicil will not revive a legacy which has been adeemed in the meantime. *Drinkwater v. Falconer*, 2 Ves. Sen. 626; *Monck v. Monck*, 1 Ba. & B. 306; *Couper v. Mantell*, 23 B. 223; *Hopwood v. Hopwood*, 7 H. L. 728; see *ante*, p. 111.

In the same way the specific gift of a debt due to the testator, and afterwards received in whole or part by him, whether the debtor pays it voluntarily or not, is adeemed *pro tanto*. *Ashburner v. Macguire*, 2 B. C. C. 108; *Fryer v. Morris*, 9 Ves. 360; *Humphries v. Humphries*, 2 Cox, 185; *Makeown v. Ardagh*, I. R. 10 Eq. 445; *Aston v. Wood*, 43 L. J. Ch. 715; *In re Bridle*, 4 C. P. D. 336.

It is immaterial that the amount of the debt is placed by the testator to a separate account. *In re Bridle, supra*.

Where a particular sum owing to the testator is bequeathed and afterwards received by him, a fresh debt subsequently incurred by the same debtor will not pass, at any rate, if the

Chap. XVII.

Gift of things in a house when adeemed. sums are not precisely the same. *Gardner v. Hatton*, 6 Sim. 93 ; *Sidney v. Sidney*, 17 Eq. 65.

Where things in a particular place, such as a house, are given and are afterwards removed to another place, the question is, whether the place is a substantive part of the bequest or whether it is merely descriptive of the things the testator refers to.

Removal is immaterial if the place is merely descriptive.

In the latter case the removal of the things to another place is immaterial. *Cunningham v. Ross*, 2 Cas. t. Lee, 272 ; *Norris v. Norris*, 2 Coll. 719 ; *Blagrove v. Coore*, 27 B. 138 ; *Norreys v. Franks*, I. R. 9 Eq. 18.

Similarly, a bequest of furniture in a house will pass furniture intended to be placed there. *Rawlinson v. Rawlinson*, 3 Ch. D. 302 ; but see *Lord Brooke v. Earl of Warwick*, 2 De G. & S. 425.

Secus, if the intention is to give only such things as may be in the place.

If, however, the bequest of the things is connected with the enjoyment of the house, both being given to the legatee ; or if the gift is of such furniture as may be in a particular place at the testator's decease, a permanent removal works an ademption. *Colleton v. Garth*, 6 Sim. 19 ; *Shaftsbury v. Shaftsbury*, 2 Vern. 747 ; *Heseltine v. Heseltine*, 3 Mad. 276 ; *Green v. Symonds*, 1 B. C. C. 129 n. ; *Spencer v. Spencer*, 21 B. 548.

Temporary removal will not adeem.

But a removal for a temporary purpose will not have this effect. *Domville v. Baker*, 32 B. 604 ; *Chapman v. Hart*, 1 Ves. Sen. 271 ; *Norreys v. Franks*, I. R. 9 Eq. 18 ; *Land v. Devaynes*, 4 B. C. C. 537 ; *Lord Brooke v. Earl of Warwick*, 2 De G. & S. 425 ; *In re Johnston* ; *Cockerell v. Earl of Essex*, 26 Ch. D. 538.

II. CHANGE OF INTEREST OF TESTATOR.

Effect of change in the testator's interest after the date of the will.

A somewhat different question arises where the nature of the testator's interest in the subject matter of a bequest alters between the date of the will and his death ; if, for instance, the testator subsequently acquires the reversion of leaseholds given by his will.

Acceptance of a new lease.

Before the Wills Act a specific bequest of a lease, unless the

testator, being *cestui que trust*, gave his interest in the lease which includes the right to the benefit of a renewal by the trustee, or expressly gave his future interest, was adeemed by the acceptance of a new lease or the acquisition of the reversion. *Curte v. Carte*, 3 Atk. 174; *James v. Dean*, 11 Ves. 383; 15 Ves. 238; *Marwood v. Turner*, 3 P. W. 163; *Abney v. Miller*, 2 Atk. 593; *Capel v. Girdler*, 9 Ves. 509; *Slatter v. Noton*, 16 Ves. 197.

In the same way, the purchase of the equity of redemption revoked a devise of the mortgaged estate. *Strode v. Lady Falkland*, 2 Vern. 621; *Yardley v. Holland*, 20 Eq. 428.

And a general gift of lands or a house in which the testator had a chattel interest was *prima facie* a gift of that interest and subject to ademption in the same way. *Rudstone v. Anderson*, 2 Ves. Sen. 418; *Hone v. Medcraft*, 1 B. C. C. 261; *Coppin v. Fernyhough*, 2 B. C. C. 291; *Colegrave v. Manby*, 6 Mad. 72; 2 Russ. 238.

Sect. 23 of the Wills Act enacts that no conveyance or other act made or done subsequently to the execution of a will of or relating to any real or personal estate therein comprised, except an act by which such will shall be revoked as aforesaid, shall prevent the operation of the will with respect to such estate or interest in such real or personal estate as the testator shall have power to dispose of by will at the time of his death.

S. 23 of
Wills Act.

The effect of the section appears to be merely to repeal the old law under which a change of interest in itself revoked a gift and to leave the court free to construe the will in such a way as to carry out the testator's intention. The section does not make something newly acquired pass under a gift if the language of the gift is not appropriate to pass it. See *Blake v. Blake*, 15 Ch. D. 487.

Thus, where a testator, having a leasehold house, gives his house for all his interest therein, or for all the residue of his term therein, and afterwards acquires the reversion, the fee simple has in several cases been held to pass. The testator's intention in those cases was, that the devisee should have the testator's interest whatever it might be. He intends to describe the property and not merely to limit the gift to the estate he

Chap. XVII. has in it at the date of his will. *Struthers v. Struthers*, 5 W. R. 809; *Miles v. Miles*, L. R. 1 Eq. 462; *Cox v. Bennett*, 6 Eq. 422; *Leckey v. Watson*, I. R. 7 C. L. 157; *Wedgwood v. Denton*, 12 Eq. 290; *Saxton v. Saxton*, 13 Ch. D. 359; see *Emuss v. Smith*, 2 De G. & S. 722; which may be upheld on other grounds.

On the other hand, a gift of the lease of the house in which the testator should reside at his death will not pass a freehold house subsequently purchased by the testator. *In re Knight*; *Knight v. Burgess*, 34 Ch. D. 518.

Share of
business.

So where the testator, being entitled to a third share of a business, bequeathed his share and interest in the business, and afterwards acquired the whole business, the whole business was held to pass. *In re Russell*; *Russell v. Chell*, 19 Ch. D. 432.

On the other hand, where a testator devises a freehold estate and afterwards sells it and allows part of the purchase-money to remain on mortgage of the estate, the mortgage money does not pass under the devise of the estate. *Moor v. Raisbeck*, 12 Sim. 123; *In re Clowes*, (1893) 1 Ch. 214.

If the sale is not completed at the death the devise is nevertheless revoked. *Farrar v. Earl of Winterton*, 5 B. 1; *Goold v. Teague*, 7 W. R. 84; 5 Jur. N. S. 116.

III. RIGHT OF RETAINER.

Right of
retainer
against
specific
legatee.

A specific devise or specific gift of leaseholds or other chattels is not subject to the executor's right of retainer for a debt due from the legatee to the estate. *Harvey v. Palmer*, 4 De G. & S. 425; *In re Akerman*; *Akerman v. Akerman*, (1891) 3 Ch. 212.

But a specific gift of moneys arising from the profits of a business is subject to the right of retainer. *In re Taylor*; *Taylor v. Wade*, (1894) 1 Ch. 671.

The right of retainer may be exercised not only against a share of personal residue but also against a share in the proceeds of real estate given to the executors upon trust for sale. *In re Akerman*; *Akerman v. Akerman*, (1891) 3 Ch. 212.

In the case of general legacy the executor is entitled to retain so much of the legacy as may be sufficient to pay a debt due to the testator from the legatee, even though the debt may be barred by statute. *Courtenay v. Williams*, 3 Ha. 539; *In re Cordwell's Estate*; *White v. Cordwell*, 20 Eq. 644. Chap. XVII.
Against
general
legacy.

Costs of administration directed to be paid by a legatee are within the same rule; and the assignee of a legatee takes subject to the executor's rights against the legatee. *In re Knapman's Estate*; *Knapman v. Wreford*, 18 Ch. D. 300.

In the case of a legatee who becomes bankrupt after the testator's death, the executor is, it seems, entitled to retain the debt. But if he proves in the bankruptcy the right of retainer is gone. *Stammers v. Elliott*, 3 Ch. 195; *Armstrong v. Armstrong*, 12 Eq. 614: see *In re Whitehouse*; *Whitehouse v. Edwards*, 37 Ch. D. 683. Bankrupt
legatee.

In the case of a legatee bankrupt at the death of the testator there is no right to retain the debt out of the legacy, since there was never a time at which the same person was entitled to receive the legacy and liable to pay the whole debt. Dividends payable under the bankruptcy, if any have been declared, may be retained. *Cherry v. Boulton*, 2 Kee. 319; 4 M. & Cr. 442; *In re Hodgson*; *Hodgson v. Fox*, 9 Ch. D. 673; *In re Orpen*; *Beswick v. Orpen*, 16 Ch. D. 202; *Re Rees*; *Rees v. Rees*, 60 L. T. 260.

A debt due from the husband of a legatee may be retained out of so much of the legacy as is payable to the husband after the legatee's equity to a settlement is satisfied. *M'Mahon v. Burchell*, 5 Ha. 325; *In re Briant*; *Poulter v. Shackel*, 39 Ch. D. 471. Debt due
from husband
of legatee.

Where a married woman assigns her reversionary interest under Sir R. Malins' Act (20 & 21 Vict. c. 57), there is no right as against the assignee to retain a debt due from the husband. *In re Batchelor*; *Sloper v. Oliver*, 16 Eq. 481. Assignment
under Malins'
Act.

If would seem that if A. is the executor of B. and C., C. being B.'s residuary legatee, a sum due from D. to B. might be retained out of the share to which D. is entitled in C.'s estate. *Stammers v. Elliott*, 3 Ch. 195.

Chap. XVII.

The right of retainer is gone as soon as the executors have set apart and invested a sum to meet a legacy. *Ballard v. Marsden*, 14 Ch. D. 374.

Claims in
autre droit.

Cross demands existing in different rights cannot be set off. Thus, a debt due to the executor in his personal capacity cannot be retained out of a legacy. *M'Mahon v. Burchell*, 2 Ph. 127; see *Stammers v. Elliott*, 3 Ch. 195; *Middleton v. Pollock*; *Ex parte Nugee*, 20 Eq. 29.

IV. EXONERATION OF SPECIFIC LEGACIES.

Exoneration
of specific
legacies from
debts and
liabilities of
testator.

1. Liabilities created by testator.

A specific legatee has a right to have his specific legacy freed from the debts and liabilities of the testator existing at his decease. *Stewart v. Denton*, 4 Doug. 219; S. C. 2 Chit. 456; *Barry v. Harding*, 1 J. & Lat. 489; *Fitzwilliams v. Kelly*, 10 Ha. 266.

So if the testator has pledged the legacy, whether for his own debt or not, the legatee is entitled to compensation. *Knight v. Davis*, 3 M. & K. 358; *Bothamley v. Sherson*, 20 Eq. 304.

2. Liabilities incidental to the thing.

With regard to payments on specific legacies which become due after the testator's decease, the distinction is between charges created by the testator and charges incident to the chattel.

Rent falling
due after the
testator's
death.

Thus, rent or fines falling due after the testator's death are payable by the legatee. *Fitzwilliams v. Kelly*, 10 Ha. 266; see *Hawkins v. Hawkins*, 13 Ch. D. 470.

Gift of
leaseholds.

If a legatee of leaseholds is to take subject to the performance of the covenants in the lease, he must bear the expense of repairs in respect of dilapidations existing at the testator's death. *Hickling v. Boyer*, 3 Mac. & G. 635.

Under a gift of a leasehold house "free of all outgoing and payments except the annual and other rent" the legatee was held entitled to have the outgoing cleared only up to the time

of taking possession. *In re Taber*; *Arnold v. Kayess*, 46 L. T. Chap. XVII. 805; 30 W. R. 883; 51 L. J. Ch. 721.

As to calls upon shares, the cases are somewhat conflicting; but on the whole it seems if the testator's estate does not remain liable, the liability must be borne by the specific legatee. *Armstrong v. Burnet*, 20 B. 424. Calls on shares must be paid by legatee.

And even if the testator's estate remains liable, but the liability is such that neither the testator nor his estate might ever have become chargeable with it, such as the liability on shares in a banking or insurance company, the specific legatee must bear it. *Armstrong v. Burnet*, *supra*; *Adams v. Ferrick*, 26 B. 384; see *Wright v. Warren*, 4 De G. & S. 867; *Fitzwilliams v. Kelly*, 10 Ha. 266; *In re Box*, 12 W. R. 67; 1 H. & M. 552.

And it seems that calls on railway shares made after the testator's decease must be borne by the specific legatee. *Day v. Day*, 1 Dr. & Sm. 261.

It would seem that *Blount v. Hipkins*, 7 Sim. 43; *Jacques v. Chambers*, 4 Rail. Cases, 499; and *Clive v. Clive*, Kay, 600, would not now be followed, unless the two former can be supported on the ground that the testator had covenanted to pay the calls within a given time.

A direction to pay calls due upon shares for the time being constituting part of the testator's residuary estate has been confined to calls upon shares accepted by the testator at the time of his death. *Bevan v. Waterhouse*, 3 Ch. D. 752.

Where a testator, being joint tenant at law with his partner of leasehold property employed for partnership purposes, bequeathed to the partner all his share of the leasehold premises, it was held that the partner was entitled to the moiety only after the partnership debts had been paid. *Farquhar v. Hadden*, 7 Ch. 1.

V. EXONERATION OF MORTGAGED PROPERTY.

In cases not affected by the Real Estate Charges Act, 1854, commonly called Locke King's Act (17 & 18 Vict. c. 113) amended by 30 & 31 Vict. c. 69, and 40 & 41 Vict. c. 84, the devisee of mort- Exoneration of mortgaged property in cases before Locke King's Act.

Chap. XVII. gaged lands, the mortgages upon which have been either created or adopted by the testator, is entitled, in the absence of a contrary intention, to have the mortgage paid off out of the first four classes of property in the administration of assets; and as regards the fourth, viz., real estate charged with debts generally, if the mortgaged lands are themselves included in the general charge of debts, they must bear a proportionate part of the mortgage. *Middleton v. Middleton*, 15 B. 450; *Harper v. Munday*, 7 D. M. & G. 369.

Pecuniary legacies are not applicable to exonerate mortgaged property, whether freehold or leasehold. *Lutkins v. Leigh*, Cas. t. Talb. 53; *Johnson v. Child*, 4 Ha. 87.

Similarly, where mortgaged lands descend, the heir is entitled to exoneration out of the first two classes of property. *Hill v. Bishop of London*, 1 Atk. 621; *Chester v. Powell*, 7 Jur. 389; *Yonge v. Furze*, 20 B. 380.

Devise of mortgaged lands subject to the mortgage will not exonerate the personalty.

A devise of lands expressly subject to the mortgage thereon will not exonerate the personalty, the words "subject to the mortgage" being held merely descriptive. *Duke of Ancaster v. Meyer*, 1 B. C. C. 454; *Bickham v. Cruttwell*, 3 M. & Cr. 763.

Direction to pay off certain mortgage.

A direction that a mortgage on a certain estate is to be paid off will not exonerate the personalty from paying off mortgages on other estates. *In re Bull*; *Catty v. Bull*, 49 L. T. 592.

Nor will a direction that part of the mortgaged land is to bear a larger proportion of the mortgage than another part. *Goodwin v. Lee*, 1 K. & J. 377.

Charge of mortgages on the mortgaged land in a distinct sentence.

But it would seem that a charge of the mortgage debt upon the mortgaged land in a distinct sentence will make the land primarily liable. *Evans v. Cockeram*, 1 Col. 428. See *Hancox v. Abbey*, 11 Ves. 179.

Locke King's Act.

The law on this subject has been altered by Locke King's Act (17 & 18 Vict. c. 113), which enacts that "when any person shall, after the 31st of December, 1854, die seised of or entitled to any estate or interest in any land or other hereditaments, which shall at the time of his death be charged with the payment of any sum or sums of money by way of mortgage, and such person shall not, by his will or deed or other document, have

signified any contrary or other intention, the heir or devisee to whom such land or hereditaments shall descend or be devised shall not be entitled to have the mortgage debt discharged or satisfied out of the personal estate or any other real estate of such person, but the land or hereditaments so charged shall, as between the different persons claiming through or under the deceased person, be primarily liable to the payment of all mortgage debts with which the same shall be charged, every part thereof, according to its value, bearing a proportionate part of the mortgage debts charged on the whole thereof: Provided always, that nothing herein contained shall affect or diminish any right of the mortgagee on such lands or hereditaments to obtain full payment or satisfaction of his mortgage debt, either out of the personal estate of the person so dying as aforesaid or otherwise. Provided also, that nothing herein contained shall affect the rights of any person claiming under or by virtue of any will, deed, or document already made, or to be made before the 1st of January, 1855.

The Real Estate Charges Act, 1867 (30 & 31 Vict. c. 69) extends and defines the meaning of the words "contrary or other intention" in the case of testators dying after the 31st of December, 1867, and by sect. 2 declares that in the construction of the principal Act the word mortgage shall be deemed to extend to any lien for unpaid purchase money upon any lands or hereditaments purchased by a testator.

By the Real Estate Charges Act, 1877 (40 & 41 Vict. c. 34) it is enacted as follows:

1. The Acts mentioned in the schedule hereto (17 & 18 Vict. c. 113; 30 & 31 Vict. c. 69) shall, as to any testator or intestate dying after the 31st December, 1877, be held to extend to a testator or intestate dying seised or possessed of or entitled to any land or other hereditaments of whatever tenure, which shall at the time of his death be charged with the payment of any sum or sums of money by way of mortgage, or any other equitable charge, including any lien for unpaid purchase money; and the devisee or legatee or heir shall not be entitled to have such sum or sums discharged or satisfied out of any other estate of the testator or intestate, unless (in the case of a testator) he

Chap. XVII. shall, within the meaning of the said Acts, have signified a contrary intention; and such contrary intention shall not be deemed to be signified by a charge of or direction for payment of debts upon or out of residuary real and personal estate, or residuary real estate.

2. This Act shall not extend to Scotland.

WHAT PERSONS ARE WITHIN THE ACTS.

What persons
are within the
Acts.

The Crown taking personalty in default of next of kin is within the words "persons claiming through or under the deceased person" in Locke King's Act. *Dacre v. Patrickson*, 1 Dr. & Sm. 186.

The heir taking by descent, owing to lapse or otherwise, from a person dying after the 31st December, 1854, is not entitled to exoneration under the exception in the proviso in the original Act, though the will may be made before the 1st January, 1855. *Power v. Power*, 8 Ir. Ch. 340; *Piper v. Piper*, 1 J. & H. 91; *Nelson v. Page*, 7 Eq. 25.

On the other hand, a devisee taking under a will made before the 1st January, 1855, is within the proviso, though the will may have been republished after that date. *Rolfe v. Perry*, 3 D. J. & S. 481.

The donee of an option to purchase land at a fixed price is not a devisee within the Act. *Given v. Massey*, 31 L. R. Ir. 126.

WHAT PROPERTY IS WITHIN THE ACTS.

Copyholds. Copyholds are within Locke King's Act. *Piper v. Piper*, 1 J. & H. 91.

Land on trust for sale. Land devised on trust for sale, and coming to the testator as personalty, is not within that Act. *Lewis v. Lewis*, 13 Eq. 219.

Leaseholds. Leaseholds are not within the original Act or the Act of 1867. *Soloman v. Soloman*, 12 W. R. 540; 33 L. J. Ch. 473; *Gael or Gall v. Fenwick*, 22 W. R. 211; 43 L. J. Ch. 178; *In re Wormsley's Estate*; *Hill v. Wormsley*, 4 Ch. D. 665.

They are within the Act of 1877. *In re Kershaw*; *Drake v. Kershaw*, 37 Ch. D. 674.

The Act applies where real and personal estate are directed to be converted, and the proceeds made a mixed fund. *Elliott v. Dearsley*, 16 Ch. D. 322. Chap. XVII.

If the mortgage includes freeholds and leaseholds, the mortgage must be apportioned between the freeholds and leaseholds according to their values at the testator's death, and the amount apportioned in respect of the leaseholds will, in cases not within the Act of 1877, be discharged out of the personal estate or out of the fund appointed for payment of debts. *Gall v. Fenwick*, *supra*.

WHAT MORTGAGES ARE WITHIN THE ACTS.

Mortgages by deposit of title deeds, with or without a memorandum of agreement to execute a legal mortgage, are within the Act. *Pembroke v. Friend*, 1 J. & H. 132; *Davis v. Davis*, 24 W. R. 962. Mortgage by deposit.

So is a deposit of deeds, with a memorandum, though expressed to be only a collateral security. *Coleby v. Coleby*, L. R. 2 Eq. 803.

But a mere general charge by a testator on real estate in aid of his personalty is not within the Act. *Hepworth v. Hill*, 30 B. 476; see the Act of 1877, *supra*.

Nor is a covenant to pay off a mortgage on land not belonging to the covenantor. *Day v. Day*, 14 W. R. 261.

A judgment under which the land has been delivered in execution under a writ of elegit and a judgment mortgage in Ireland, are charges within the Acts. *In re Anthony*; *Anthony v. Anthony*, (1892) 1 Ch. 450; *Nesbett v. Lander*, 17 L. R. Ir. 53.

A lien for unpaid purchase money on lands purchased by a testator is, by 30 & 31 Vict. c. 69, sect. 2, declared to be within the original Act. *In re Cockcroft*; *Broadbent v. Groves*, 24 Ch. D. 94; *In re Kidd*; *Brooman v. Withall*, (1894) 3 Ch. 558. Lien for purchase-money.

The lien for unpaid purchase money must be borne by the land, though the testator devises only the legal estate without disposing of the beneficial interest. *Dowdall v. M'Cartan*, 5 L. R. Ir. 313, 642.

Chap. XVII.

The heir of an intestate dying before the 31st December, 1877, is entitled to have a lien for unpaid purchase money upon lands of the intestate discharged out of the personal estate, the case not being provided for by the Act of 1867. *Harding v. Harding*, 13 Eq. 493.

The heir of an intestate dying after the 31st December, 1877, is not entitled to have a lien for unpaid purchase money discharged. See the Act of 1877, *supra*, p. 137.

WHAT IS A CONTRARY INTENTION WITHIN THE ACTS.

How contrary intention ascertained.

The contrary intention is to be ascertained by referring not only to the will, but also to the mortgage and other deeds connected with it. *In re Campbell*; *Campbell v. Campbell*, (1893) 2 Ch. 206.

Direction to pay debts.

It was decided that a general direction to pay debts, or to pay debts out of the estate, did not show the contrary intention required by Locke King's Act. *Pembroke v. Friend*, 1 J. & H. 132; *Brownson v. Lawrance*, 6 Eq. 1; *Woolstencroft v. Woolstencroft*, 2 D. F. & J. 347.

Whether the fact that mortgaged lands are devised in strict settlement would make any difference seems doubtful; at any rate it would not where the testator himself contemplates the mortgages as subsisting from generation to generation. *Cootte v. Lowndes*, 10 Eq. 376.

Direction to pay debts out of the personal estate or a particular fund.

But a direction, that the debts are to be paid out of the personal estate or out of any particular fund, was held to show a contrary intention. *Moore v. Moore*, 1 D. J. & S. 602; *Eno v. Tatham*, 3 D. J. & S. 443; 32 L. J. Ch. 311; *Mellish v. Vallins*, 2 J. & H. 194; *Newman v. Wilson*, 31 B. 33; *Maxwell v. Hyslop*, L. R. 4 Eq. 407; *ib.* 4 H. L. 506. See *Allen v. Allen*, 30 B. 395; *Porcher v. Wilson*, 12 W. R. 1001.

The Amendment Act, 30 & 31 Vict. cap. 69.

By 30 & 31 Vict. c. 69, however, it is enacted that in the wills of testators dying after the 31st December, 1867, a declaration that debts are to be paid out of the personal estate is not to be deemed a declaration of intention to exonerate mortgaged lands.

Chap. XVII.

Under this Act, "if a testator wishes to give a direction which shall be deemed a declaration of an intention contrary to the rule laid down by Locke King's Act, it must be a direction applying to his mortgage debts in such terms as distinctly and unmistakably to refer to them;" per Giffard, V.-C., in *Nelson v. Page*, 7 Eq. 25, p. 28. See *Allen v. Allen*, 30 B. 395; *Greated v. Greated*, 26 B. 621.

In cases governed by the Act of 1867, a direction to pay debts out of a mixed fund of realty and personalty, or a direction to pay debts out of the personal estate in exoneration of the real estate, or a charge of debts on certain real estate in aid of the personal estate and in exoneration of the other real estate, will not entitle the devisee of mortgaged lands to have the mortgage discharged. *Gael or Gall v. Fenwick*, 22 W. R. 211; 43 L. J. Ch. 178; *In re Rossiter*; *Rossiter v. Rossiter*, 13 Ch. D. 355; *In re Newmarch*; *Newmarch v. Storr*, 9 Ch. D. 12; *Elliott v. Dearsley*, 16 Ch. D. 322; and see the Act of 1877, *supra*, p. 138.

Direction to
pay debts.

A direction to pay all debts of every kind, including specialty debts, has been held not to include mortgage debts. *Buckley v. Buckley*, 19 L. R. Ir. 544.

Where a testator charged his trade debts upon his residue, and after the date of his will deposited the title deeds of real estate with his bankers to secure an overdrawn trade account, it was held that the charge showed a contrary intention. *In re Fleck*; *Colston v. Roberts*, 37 Ch. D. 677.

Charge of
trade debts.

So where a testator charged his property used in trade with his trade debts, and his residue with all other debts, inasmuch as the trade debts included debts secured by mortgage, it was held that other debts charged on the residue also included debts secured by mortgage. *In re Nevill*; *Robinson v. Nevill*, 59 L. J. Ch. 511; 62 L. T. 864.

Where part of lands subject to a mortgage is specifically devised, and the rest given to the residuary devisee, or where a life interest is given, and the remainder is given to the residuary devisee, there is no evidence of an intention, that the mortgage is to be borne by the residuary devisee. *Gibbins v. Eyden*, 7 Eq. 371; *Sackville v. Smyth*, 17 Eq. 153; *In re Smith*;

Specific
devisee of part
of land sub-
ject to a
mortgage is
not entitled
to exonera-
tion.

Chap. XVII. *Hannington v. True; Giles v. True*, 33 Ch. D. 195; overruling *Brownson v. Lawrance*, 6 Eq. 1.

Direction to pay mortgages out of insufficient fund.

The further question may arise whether, supposing the testator directs the mortgages to be paid out of a specific fund, the devisees will be entitled to exoneration if that fund is insufficient.

It would seem, where the fund is a fund of personalty, the devisees will not be entitled to exoneration beyond the value of the fund. *Rodhouse v. Mold*, 13 W. R. 854; 35 L. J. Ch. 67.

On the other hand, it is laid down by Lord Romilly in *Allen v. Allen*, 30 B. 403, that where a mortgage on Whiteacre is directed to be paid out of Blackacre, the mortgagee is entitled to exoneration out of the personal estate in the first place, as the Act only directs that the mortgaged land shall be primarily liable, and does not alter the ordinary rules of administration where there is an intention that it should not be so liable. But *quære* whether the decision above cited and this dictum are reconcilable; and see *Smith v. Moreton*, 37 L. J. Ch. 6.

How far mortgaged lands applicable in payment of mortgages.

It would seem, that where mortgages are directed to be paid and the personalty is insufficient to pay them, the several lands bear only the mortgages secured upon them, and not a proportionate share of all the mortgages. *Wisden v. Wisden*, 5 Jur. N. S. 455.

Mortgaged estate devised to different persons.

Where different portions of an estate subject to a mortgage are devised to different persons, the devisees must contribute rateably to pay the mortgage according to the value of the portions devised to them. *In re Newmarch; Newmarch v. Storr*, 9 Ch. D. 12.

Realty and personalty mortgaged together.

The same rule applies if the mortgage comprises real and personal property. The devisees of the land and the legatees of the personalty contribute rateably. *Trestruil v. Mason*, 7 Ch. D. 655.

Collateral mortgage.

Where several properties are mortgaged contemporaneously by different deeds, the fact that one of the mortgages is called a collateral security will not throw the mortgage debt primarily on the property comprised in the other mortgage. *Early v. Early*, 16 Ch. D. 214; *In re Athill*, 16 Ch. D. 211.

Successive mortgages.

Where a testator mortgages certain land and then mortgages

other land for the same debt and further advances, the whole amount due will, as between the devisees of the different lands, be treated as one debt, and must be borne rateably by the various properties unless it is shown that the land first charged was intended to be the primary security for the amount advanced prior to the second mortgage. *Leonino v. Leonino*, 10 Ch. D. 460, where the cases of *Lipscomb v. Lipscomb*, 7 Eq. 501, and *De Rochefort v. Dawes*, 12 Eq. 540, are discussed; and see *Stringer v. Harper*, 26 B. 33; *Evans v. Wyatt*, 31 B. 217. Chap. XVII.

Where a portion of lands subject to a charge is conveyed by a voluntary deed, containing only a covenant for further assurance, and the rest is devised, the lands conveyed and devised must bear the charge rateably. *Ker v. Ker*, I. R. 4 Eq. 15.

Property subject to a general lien for a debt in respect of which the testator has given a specific security does not contribute rateably with the property comprised in the security to payment of the debt. *In re Dunlop; Dunlop v. Dunlop*, 21 Ch. D. 583.

Locke King's Act and the amending Acts do not affect the doctrine of marshalling; so that an annuitant whose annuity is charged only on land which is subject to a mortgage may stand in the shoes of the mortgagee as against the personal estate. *Buckley v. Buckley*, 19 L. R. Ir. 544. Marshalling.

VI. RENTS, PROFITS, AND INCOME.

1. A present devise of lands being specific carries the rents and profits from the death of the testator.

But a devise of all the testator's interest in an estate when recovered will not carry rents accrued due prior to his death. *Scott v. Best*, 6 L. R. Ir. 7. Devisee is entitled to rents from the testator's death.

Where the devise is of rents due prior to the testator's death, derived from property of which the testator is tenant for life, interest upon charges must be deducted, unless the charges are vested in the testator. *Lindsay v. Earl of Wicklow*, I. R. 6 Eq. 72.

2. A specific bequest, if vested, carries all the income and Specific bequest.

Chap. XVII.

profits which may accrue upon it after the testator's death. *Clive v. Clive*, Kay, 600; *Maclaren v. Stainton*, 3 D. F. & J. 202; and see *Carron Company v. Hunter*, L. R. 1 H. L. Sc. 362.

What are profits.

The question sometimes arises what are profits accruing after the death of the testator.

Bonus on shares.

A bonus or dividend on shares declared before the testator's death, but not payable till afterwards, will not pass with the shares. *Lock v. Venables*, 27 B. 598; *De Gendre v. Kent*, L. R. 4 Eq. 283.

Partnership profits.

Nor will the profits of a partnership, declared after the testator's death, for a period ending in his lifetime. *Ibbotson v. Elam*, L. R. 1 Eq. 188; *Browne v. Collins*, 12 Eq. 586.

Debts.

On the other hand, a debt is to be considered as the profits of the year in which it is paid. *Maclaren v. Stainton*, 3 D. F. & J. 202.

Apportionment Act.

3. Since the Apportionment Act, 33 & 34 Vict. c. 35, rents, annuities, dividends and other periodical payments in the nature of income are to be considered as accruing from day to day, and are apportionable where the testator dies between two rent days.

Sect. 5 defines dividends as including all payments made by the name of dividend, bonus, or otherwise out of the revenue of trading or other public companies, whether such payments shall be usually made or declared at any fixed times or otherwise; but they do not include payments in the nature of a return or reimbursement of capital.

Will before Act.

The Act has been held to apply to a will executed before and confirmed by a codicil executed after the passing of the Act. *Hasluck v. Pedley*, 19 Eq. 271; *Constable v. Constable*, 48 L. J. Ch. 621; see *Roseingrave v. Burke*, I. R. 7 Eq. 187.

It has also been held to apply to the will of a testator dying before the Act came into operation. *In re Cline's Estate*, 18 Eq. 213; *Patching v. Barnett*, 28 W. R. 886; *Lawrence v. Lawrence*, 26 Ch. D. 795; see *Jones v. Ogle*, 8 Ch. 192.

The Act applies to specific as well as to residuary devises. *Capron v. Capron*, 17 Eq. 288; *Pollock v. Pollock*, 18 Eq. 329, overruling *Whitehead v. Whitehead*, 16 Eq. 528; see *A.-G. v. Daly*, I. R. 8 Eq. 595.

The profits of a private trading partnership, or of a business belonging to the testator, are not apportionable under the Act. *Jones v. Ogle*, 8 Ch. 192; *In re Cox's Trusts*, 9 Ch. D. 159. Chap. XVII.
Profits of private partnership.

A public company within the meaning of the Act need not necessarily be an incorporated company. See *In re Griffith*; *Carr v. Griffith*, 12 Ch. D. 655. What is a public company.

A bonus or surplus profits distributed among the shareholders of a public company once in five years is apportionable under the Act. *In re Griffith, supra*.

In determining what is corpus and what interest, the Apportionment Act applies as well between tenant for life and remainderman as where in certain events an absolute interest is cut down to a life interest. *Clive v. Clive*, 7 Ch. 433.

As to the effect of a gift of arrears of rents and profits to a specific devisee, subject to "outgoings properly chargeable against such arrears," see *In re Duke of Cleveland's Estate*; *Wolmer v. Forester*, (1894) 1 Ch. 164.

The Act does not apply where a testator directs interest to be paid on a legacy till it is appropriated, and the executors purchase stock on which five months' interest has accrued. In such a case the tenant for life is entitled to interest up to the date of the investment and to the whole dividend. *In re Clarke*; *Barker v. Perowne*, 18 Ch. D. 160.

Where a testator forgave to a tenant "all rent or arrears of rent which may be due and owing from him to me at the time of my decease," it was held that rent accrued due since the last quarter-day before the testator's death was not forgiven. *In re Lucas*; *Parish v. Hudson*, 55 L. J. Ch. 101; 54 L. T. 30.

4. A future devise of lands, whether the fee is vested in trustees or is in abeyance, does not carry the intermediate rents and profits, which pass either under the residuary clause, if there is one, or to the heir. *Hopkins v. Hopkins*, Ca. t. Talb. 45; *Hopkins v. Hopkins*, 1 Ves. Sen. 268; *Duffield v. Duffield*, 3 Bl. N. S. 260; *Percival v. Percival*, 9 Eq. 386; *In re Eddels' Trusts*, 11 Eq. 559; see, however, *Best v. Donmall*, 40 L. J. Ch. 160. Future devise does not carry the intermediate rents.

The intermediate rents are undisposed of till the actual birth of the devisee. *Richards v. Richards*, Jo. 754; *Mowlem's Trust*,

Chap. XVII.

Contingent
specific
bequests.

18 Eq. 9; see *Rawlins v. Rawlins*, 2 Cox, 425; *Goodale v. Gawthorne*, 2 W. R. 680; 2 Sm. & G. 375.

5. A contingent specific bequest of chattels real or personalty, where the subject matter of the gift is not directed to be set apart from the rest of the estate, will not carry the intermediate profits, except perhaps in the case of a person who would be entitled to interest on a general legacy from the testator's death. See *post*, p. 151, *et seq.*; *Holmes v. Prescott*, 12 W. R. 636; *Guthrie v. Walrond*, 22 Ch. D. 573; see *Wright v. Warren*, 4 De G. & S. 367.

If the subject matter of the bequest is directed to be set apart from the rest of the estate—for instance, if it is given to trustees upon trust for a class of persons who attain twenty-one, the intermediate profits will go to the legatee. *In re Clements*; *Clements v. Pearsall*, (1894) 1 Ch. 665.

Future
residuary
devise.

6. A future residuary devise, or a devise subject to prior limitations which may or may not take effect, will not carry intermediate rents and profits. *Hodgson v. Earl of Bective*, 1 H. & M. 376; 12 W. R. 625; 10 H. L. 656; *Wade Gery v. Handley*, 1 Ch. D. 653; 3 Ch. D. 374; overruling *Sidney v. Wilmer*, 4 D. J. & S. 84.

A future
residuary
bequest carries
the inter-
mediate
interest.

7. A contingent residuary gift of personalty carries the intermediate interest during the period allowed for accumulation. *Green v. Ekins*, 2 Atk. 473; *Drakeley's Estate*, 19 B. 395; *Earl of Bective v. Hodgson*, 12 W. R. 625; 10 H. L. 656; *Re Lindo*; *Askin v. Ferguson*, 59 L. T. 462.

The case of *Green v. Tribe*, 27 W. R. 39, appears to be inconsistent with *Earl of Bective v. Hodgson*, unless it can be supported on the ground that the income of residuary personalty bequeathed to a class is undisposed of until a member of the class comes into being.

Chattels real comprised in a residuary gift follow the same rule as personalty proper. *Hodgson v. Earl of Bective*, 1 H. & M. 376; 10 H. L. 656.

So will a
future resi-
duary gift of
a mixed fund.

8. If realty and personalty are blended in a future residuary gift, though the realty may not be directed to be sold, so as to create a mixed fund, intermediate profits will pass. *Genery v. Fitzgerald*, Jac. 468; *Glanvill v. Glanvill*, 2 Mer. 38; *Ackers*

v. *Phipps*, 9 Bl. N. S. 431 ; 3 Cl. & F. 665 ; see *In re Townsend's Estate* ; *Townsend v. Townsend*, 34 Ch. D. 357. Chap. XVII.

This rule applies though the realty and personalty are given in separate clauses, if both are intended to go in the same way. *In re Dumble* ; *Williams v. Murrell*, 23 Ch. D. 360 ; *In re Burton's Will* ; *Banks v. Heaven*, (1892) 2 Ch. 38.

But the rule does not apply where some of the limitations of the realty and personalty are distinct. *Re Williams* ; *Spencer v. Brighthouse*, 54 L. T. 831.

Where real and personal estate were devised on trust to sell and pay the income to A. for life, and after his death in trust for his children, and A.'s life interest was void, and he had no children living, it was held that during A.'s life, and so long as he had no children, the income was undisposed of. *In re Townsend's Estate* ; *Townsend v. Townsend*, 34 Ch. D. 356.

9. Personalty to be laid out in land, or realty to be converted, follow the rules of personalty and realty respectively. *Earl of Bective v. Hodgson*, 10 H. L. 656.

10. Where there is a gift to a class of a fund, which carries intermediate income, the following further rules apply :— Fund carrying income given to a class.

(a) If the members of the class take vested interests at birth, the income is divisible among those members of the class who are for the time being in existence. A member of the class is entitled to income only as from his birth. *Shepherd v. Ingram*, Amb. 448 ; *Mills v. Norris*, 5 Ves. 335.

(b) If the gift is to members of the class who attain twenty-one, a member of the class who has attained twenty-one is entitled to the income upon his share, having regard to the number of members of the class then in existence, but without regard to the possibility of other members of the class being subsequently born. *Hawkins v. Combe*, 1 B. C. C. 335 ; *Brandon v. Aston*, 2 Y. & C. C. 30 ; *Mainwaring v. Beevor*, 8 Ha. 44 ; *Rochford v. Hackman*, 9 Ha. 475 ; *In re Holford* ; *Holford v. Holford*, (1894) 3 Ch. 30.

It follows that if a second member of the class is born during the minority of the first, the whole income until the birth of the second member belongs to the first if he attains twenty-one. If this were not so, difficulties would arise in applying the

Chap. XVII. income for maintenance until the limits of the class are ascertained. See *Mills v. Norris*, 5 Ves. 335; *Scott v. Earl of Scarborough*, 1 B. 154.

But a member of the class who has attained twenty-one, there being other members of the class in existence under twenty-one, is only entitled to the income of his share, having regard to the number of members of the class for the time being in existence. *Brandon v. Aston*, 2 Y. & C. C. 30; *In re Burton's Will*; *Banks v. Heaven*, (1892) 2 Ch. 38; *In re Holford*; *Holford v. Holford*, (1894) 3 Ch. 30; see *In re Jeffery*; *Burt v. Arnold*, (1891) 1 Ch. 671, where the decision was founded upon an erroneous report of *Furneaux v. Rucker*, W. N. 1879, 135; *In re Adams*; *Adams v. Adams*, (1893) 1 Ch. 329.

Fund not
carrying
income given
to a class.

11. Where there is a gift to the members of a class who attain twenty-one of a fund or property which does not carry the intermediate income, the members of the class who have for the time being attained twenty-one are entitled to the whole income, though there may be other members of the class in existence who have not attained twenty-one. *Furneaux v. Rucker*, W. N. 1879, 135, as explained in *In re Burton's Will*; *Banks v. Heaven*, (1892) 2 Ch. 38, p. 46; and *In re Adams*; *Adams v. Adams*, (1893) 1 Ch. 329, p. 331; see *Stone v. Harrison*, 2 Coll. 715.

VII. INTEREST ON GENERAL LEGACIES.

Conveyancing
Act, 1881.

Sect. 43 of the Conveyancing and Law of Property Act, 1881 (44 & 45 Vict. c. 41), provides that "where any property is held by trustees in trust for an infant either for life or for any greater interest, and whether absolutely or contingently on his attaining the age of twenty-one years, or on the occurrence of any event before his attaining that age, the trustees may, at their sole discretion, pay to the infant's parent or guardian, if any, or otherwise apply for or towards the infant's maintenance, education or benefit, the income of that property or any part thereof, whether there is any other fund applicable to the same

purpose, or any person bound by law to provide for the infant's maintenance or education or not." Chap. XVII.

Sect. 43 of the Conveyancing Act does not make a legacy to an infant at a future time carry interest. Effect of 44 & 45 Vict. c. 41, s. 43.

The income therefore cannot be applied in maintenance, unless the legacy carries interest. *In re Judkin's Trusts*, 25 Ch. D. 743; *In re Dickson*; *Hill v. Grant*, 28 Ch. D. 291; 29 Ch. D. 331, following the similar decisions under Lord Cranworth's Act (23 & 24 Vict. c. 145), sect. 26; *In re Cotton*, 1 Ch. D. 232; *In re George*, 5 Ch. D. 837.

Where a legacy is contingent or payable at a future time, and interest is given in the meantime, or the income is given for maintenance, the whole interest or income as it accrues vests absolutely in the legatee. *Harris v. Finch*, M'Clel. 141; *In re Peek's Trust*, 16 Eq. 221. Interest given to a legatee vests absolutely as it accrues.

Where a legacy is charged upon land only, interest is payable from the testator's death. *Spurway v. Glyn*, 9 Ves. 483; *Shirt v. Westby*, 16 Ves. 393; *Pearson v. Pearson*, 1 Sch. & Lef. 10. Legacy charged on land only.

An immediate legacy charged on the proceeds of sale of land carries interest only from a year after the death, but if the legacy is given at the death of the tenant for life, when the land is to be sold, it carries interest from the death of the tenant for life. *Turner v. Buck*, 18 Eq. 301; *In re Waters*; *Waters v. Boxer*, 42 Ch. D. 517. Legacy charged on proceeds of sale of land.

In the case of legacies not charged on land only, the rule is that the legacy carries interest from the time when it is payable:—

(A.) Where no time of payment is fixed:

General legacies, including gifts by appointment under a power vested in a married woman, are payable at and carry interest from the end of a year from the testator's death. *Tatham v. Drummond*, 2 H. & M. 262.

In the same way in the case of a gift of a sum of money to one for life with remainders over, interest begins to run from the end of a year from the testator's death. *Gibson v. Bott*, 7 Ves. 89; *In re Whittaker*; *Whittaker v. Whittaker*, 21 Ch. D. 657. Legacy for life with remainder.

Where the tenant for life is a minor, and a portion of the

Chap. XVII.

income is accumulated during the minority, the accumulations belong to the tenant for life; and sect. 43 of the Conveyancing Act, 1881, does not convert them into capital. *In re Humphreys*; *Humphreys v. Levett*, (1893) 3 Ch. 1.

Power to
accelerate or
postpone
payment.

Directions giving the executors power to accelerate or delay the payment of legacies do not alter the time from which they carry interest—for instance, a direction that a legacy is to be paid as soon as possible, or that it is not to be payable till six months after the testator's death, or that it is to be paid within four years from his decease. *Webster v. Hale*, 8 Ves. 410; *Benson v. Maude*, 6 Mad. 15; *Varley v. Winn*, 2 K. & J. 700; *Jauncey v. A.-G.*, 3 Giff. 308; *In re Olive*; *Olive v. Westerman*, 32 W. R. 608.

Direction to
pay out of
fund when
received.

Where there is a clear gift of a legacy, a direction to pay it out of a particular fund when received, will not alter the rule that the legatee is entitled to interest from the end of a year after the testator's death. *Wood v. Penoyre*, 13 Ves. 326; see *Kirkpatrick v. Bedford*, 4 App. C. 96.

If the trust to pay legacies only arises after the fund is got in, interest is not payable till then. *Lord v. Lord*, L. R. 2 Ch. 782.

A direction to apply a sum for building a church when it is wanted, without interest in the meantime, will not deprive the legacy of interest if payment is delayed by litigation. *Fisher v. Brierley*, 30 B. 268.

Effect of
charge on a
reversionary
interest.

The rule as to interest is not altered by the fact that the legacies are charged upon personalty and a reversionary interest in realty, and if the personalty is insufficient, the legacies nevertheless bear interest from a year after the death. *Freeman v. Simpson*, 6 Sim. 75; *Earl of Milltown v. French*, 4 Cl. & F. 276; 10 Bl. N. S. 1; *In re Blachford*; *Blachford v. Worsley*, 27 Ch. D. 676.

But this is not the case where the fund out of which the legacy is primarily payable is wholly reversionary. *Earle v. Bellingham*, 24 B. 448; *Re Ludlam*; *Ludlam v. Ludlam*, 63 L. T. 330.

Legacy to
executor.

Interest upon a legacy to an executor as such runs from the time when he assumes the office. An infant cannot assume the office till he attains twenty-one. *Angermann v. Ford*, 29 B

349; *Re Gardner*; *Long v. Gardner*, 67 L. T. 552; 41 W. R. Chap. XVII. 293; 3 R. 96.

On the other hand, interest is payable from the testator's death :—

1. Where the testator is the father or in *loco parentis* to the legatee, provided the latter is an infant. *Wilson v. Maddison*, 2 Y. & C. C. 372.

Interest payable from the death.

Testator in *loco parentis* to an infant.

If the infant is *in ventre* at the testator's death, interest runs only from his birth. *Rawlins v. Rawlins*, 2 Cox, 425.

2. Where the legatee, though a stranger, is an infant, and maintenance is given out of the legacy. *Newman v. Bateson*, 3 Sw. 689.

Maintenance directed out of the legacy.

3. Where the legacy is in satisfaction of a debt of the testator. *Clarke v. Sewell*, 3 Atk. 99.

Legacy in satisfaction of a debt.

A legacy to a wife does not carry interest until a year from the death. *Stent v. Robinson*, 12 Ves. 461; *Lowndes v. Lowndes*, 15 Ves. 301; *In re Percy*; *Percy v. Percy*, 24 Ch. D. 616; *In re Bignold*; *Bignold v. Bignold*, 45 Ch. D. 496.

It makes no difference that the legacy is given in lieu of jointure or in lieu of dower and freebench. *Elton v. Montague*, 1 L. J. Ch. (O. S.) 212; *In re Bignold*; *Bignold v. Bignold*, 45 Ch. D. 496.

A legacy in satisfaction of the debts of another person will not *primâ facie* carry interest till the expiration of a year from the testator's death. *Askew v. Thompson*, 4 K. & J. 620.

But if certain property is to be applied among such persons as have "any just or indisputable demand" upon a third person, interest will be payable on the debts as far as the fund will go. *Aston v. Gregory*, 6 Ves. 151.

(B.) Where a time for payment is fixed :

A legacy payable at a future day, whether vested or not, carries interest only from the time fixed for its payment. *Lloyd v. Williams*, 2 Atk. 108; *Heath v. Perry*, 3 Atk. 101; *Crickett v. Dolby*, 3 Ves. 10; *Tyrrell v. Tyrrell*, 4 Ves. 1; *Festing v. Allen*, 5 Ha. 575; *Gotch v. Foster*, 5 Eq. 311; *Lord v. Lord*, L. R. 2 Ch. 782; *Holmes v. Crispe*, 18 L. J. Ch. 439.

When a time of payment is fixed, interest runs from then.

If the period arrives in the testator's lifetime, interest runs

Chap. XVII. from his death. *Coventry v. Higgins*, 14 Sim. 30; *Pickwick v. Gibbs*, 1 B. 271.

The personal representatives of a legatee entitled to a vested legacy stand in no better position than the legatee; therefore, where a time for payment is fixed and the legatee would not have been entitled to interest in the meantime, the legacy is not payable to the personal representatives till the time when it would have been payable to the legatee. *Chester v. Painter*, 2 P. W. 336; *Roden v. Smith*, Amb. 588; *Maher v. Maher*, 1 L. R. Ir. 22.

Exceptions. But though a period is appointed for payment, or the legacy is contingent, interest runs from the death:—

Testator in
loco parentis
to an infant.

1. Where the legatee is an infant child of the testator, or an infant to whom the testator has placed himself in *loco parentis*, and the will provides no other maintenance, whether the legacy be vested or contingent. *Harvey v. Harvey*, 2 P. W. 21; *Inledon v. Northcote*, 3 Atk. 432, 438; *Donovan v. Needham*, 9 B. 164; *May v. Potter*, 25 W. R. 507; see *Mole v. Mole*, 1 Dick. 310.

Provision for
maintenance.

If the testator has made a provision for the maintenance of his infant children, interest only runs from the time when the legacy is payable. *Hearle v. Greenbank*, 3 Atk. 697, 716; *Wynch v. Wynch*, 1 Cox, 433; see *In re George*, 5 Ch. D. 837; *In re Moody*; *Woodroffe v. Moody*, (1895) 1 Ch. 101.

Where there is provision for maintenance during part of the minority, interest on the legacy will be allowed during the rest. *Chambers v. Goldwin*, 11 Ves. 1; *Martin v. Martin*, L. R. 1 Eq. 369; see *Cusack v. Jellicoe*, 22 W. R. 344.

2. If the infant legatee is a stranger, but the income is given for maintenance, interest runs from the death. *In re Richards*, 8 Eq. 119; *Chidgey v. Whitby*, 41 L. J. Ch. 699.

General in-
tention to
provide main-
tenance.

3. Upon similar grounds, where the legatees are strangers, if a general intention is expressed of providing for their maintenance out of their legacies, interest runs from the death. *Pett v. Fellows*, 1 Sw. 561, note; *Lambert v. Parker*, Coop. t. Eldon, 143; *Leslie v. Leslie*, Ll. & G. t. Sug. 1.

The fact that maintenance is given in one particular event which does not happen, is not enough. *Festing v. Allen*, 5 Ha. 575.

4. Where a fund is directed to be invested and held by trustees upon certain trusts, or is otherwise directed to be set apart from the rest of the testator's estate, it carries the income. *Chap. XVII.*
Boddy v. Davies, 1 Kee. 362; *Dundas v. Wolfe Murray*, 1 H. & M. 425; *Johnson v. O'Neill*, 3 L. R. Ir. 476; *In re Medlock*; *Ruffle v. Medlock*, 55 L. J. Ch. 738; 54 L. T. 828; *In re Snaith*; *Snaith v. Snaith*, 42 W. R. 468; 71 L. T. 318; *In re Clements*; *Clements v. Pearsall*, (1894) 1 Ch. 665. Severed fund.

It would seem that if the gift is one of a general legacy the income passes as from the time when it ought to be set apart, namely, the end of a year from the death.

A fund which has been severed for the benefit of a tenant for life and remainderman, carries the interest accruing between the death of the tenant for life and the vesting in the remainderman. *Kidman v. Kidman*, 40 L. J. Ch. 359.

So, too, an appointed fund carries the intermediate interest. *Long v. Ovenden*, 16 Ch. D. 691.

To entitle the legatees of a severed fund to interest before the time of payment, the severance must take place by virtue of directions given by the testator with reference to the fund. A fund set aside by the executors merely because the rest of the estate has become distributable, does not carry interest. *Festing v. Allen*, 5 Ha. 578; *In re Judkin's Trusts*, 25 Ch. D. 743; *In re Inman*; *Inman v. Rolls*, (1893) 3 Ch. 518.

Where there is a future gift of principal "with interest," interest is calculated from the end of a year after the testator's death till the time of payment. *Knight v. Knight*, 2 S. & St. 490. Future gift of principal with interest.

Where a vested legacy is given to an infant, and no time of payment is fixed, and the legacy is given over upon a contingency, the infant or his representatives are entitled to the interest which has accrued due till the contingency happens. *Taylor v. Johnson*, 2 P. W. 504; *Barber v. Barber*, 3 M. & Cr. 688; *Mills v. Roberts*, 1 R. & M. 555. Vested legacy divested.

The provisions of Lord Cranworth's Act (23 & 24 Vict. c. 145), sect. 26, and the Conveyancing Act, 1881, sect. 43, sub-s. (2), enabling trustees to apply the income of infants' property towards their maintenance, and directing the residue to be accumulated for the benefit of the persons ultimately

Chap. XVII. entitled to the property, do not alter the law so as to deprive the representatives of the infant of accumulations made before the gift over takes effect. *In re Buckley's Trusts*, 22 Ch. D. 583; *In re Wells*; *Wells v. Wells*, 43 Ch. D. 281; *In re Humphreys*; *Humphreys v. Levett*, (1893) 3 Ch. 1.

The person taking a vested interest under the gift over, no condition as to payment being annexed to his gift, is entitled to interest from the time when the gift over takes effect, or from a year after the testator's death, whichever period is latest. *Laundy v. Williams*, 2 P. W. 481.

Rate of interest.

The rate of interest allowed is four per cent., and it appears to be settled that that rate only will be allowed though the personalty is in a country where the current rate of interest is higher. Order LV., rule 64. *Bourke v. Ricketts*, 10 Ves. 330; *Hamilton v. Dallas*, 38 L. T. 215.

A direction to pay interest at the rate of three per cent. half-yearly, gives the legatees interest at six per cent. per annum. *Re Booker*; *Booker v. Booker*, 54 L. T. 239.

Interest on portions.

In the case of a power to direct portions to be raised out of land, if the power enables the donee to direct whether the portion is to be raised or not, he may also fix the rate of interest.

But if the power merely enables the donee to distribute the portions, only the ordinary rate of interest can be allowed, namely, four per cent. in the case of land in England, five per cent. in the case of land in Ireland. *Bulfour v. Cooper*, 23 Ch. D. 472.

Arrears of interest.

With regard to arrears of interest in cases where the Statute of Limitation does not apply, the Court will, in cases of delay, follow the analogy of the statute, and allow only six years' arrears to be recovered. *Thomson v. Eastwood*, 2 App. C. 215.

VIII. PAYMENT OF ANNUITIES.

From what time annuities are payable.

An annuity begins to run from the death of the testator; the first payment is therefore due at the end of a year unless the annuity is directed to be paid monthly or quarterly, in which case instalments are payable at the end of the first month or quarter. *Houghton v. Franklin*, 1 S. & St. 390.

If payment on stated quarterly days is directed, a proportional part is payable on the first quarterly day. *Williams v. Wilson*, 5 N. R. 266. Chap. XVII.

If the first payment of an annuity payable quarterly is directed to be made at the end of eighteen months, a quarter's instalment is payable at that time. *Irvin v. Ironmonger*, 2 R. & M. 531.

As to the postponement of an annuity till debts and legacies are paid, see *Astley v. Earl of Essex*, 6 Ch. 898; *Rawson v. M'Causland*, 1 R. 7 Eq. 284; 22 W. R. 145.

Where a sum of money is directed to be invested to produce an annuity, it appears to be doubtful whether the gift is to be considered as a legacy payable at the end of a year or as an annuity payable from the death. *Gibson v. Bott*, 7 Ves. 89. Sum to produce annuity.

Arrears of an annuity will not as a rule carry interest. *Batten v. Earnley*, 2 P. W. 163; *Anderson v. Dwyer*, 1 Sch. & Lef. 301; *Martin v. Blake*, 3 Dr. & War. 125; *Taylor v. Taylor*, 8 Ha. 120; *Torre v. Browne*, 5 H. L. 555; *Wheateley v. Davies*, 24 W. R. 818. Arrears of an annuity do not carry interest.

IX. LEGACY DUTY AND INCOME TAX.

Legacy duty, in the absence of a direction to the contrary, is in all cases payable by the legatee even though the legacy is to a creditor in discharge of a debt due from a third person. *Foster v. Ley*, 2 Sc. 438; 2 B. N. C. 269. Legacy duty—what amounts to a gift free from duty.

A direction to pay legacy duty does not include succession duty payable in respect of leaseholds. *In re Johnston*; *Cockerell v. Earl of Essex*, 26 Ch. D. 538. Direction to pay legacy duty.

A general direction in the will to pay all legacies free of deduction for tax or duty will include legacies given by a codicil. *Byne v. Currey*, 2 Cr. & Mee. 603; 4 Tyr. 479. See *Kirkpatrick v. Bedford*, 4 App. C. 96.

But a direction in the will to pay the duty on legacies "herein given" will not include legacies given by a codicil. *Early v. Benbow*, 2 Coll. 354; *Gillooly v. Plunkett*, 9 L. R. Ir. 324. See *Bonner v. Bonner*, 13 Ves. 378; *Radburn v. Jervis*, 3 B. 450. Legacies hereby given.

Chap. XVII.

In some cases, however, such words as "foregoing legacies" or "herein mentioned" have upon the general intention been extended to legacies given by a codicil. *Williams v. Hughes*, 24 B. 474; *Jauncey v. A.-G.*, 3 Giff. 308.

A direction to pay legacies free of duty is not necessarily limited to pecuniary legacies, but may include a debt which is forgiven, and stock legacies and specific legacies. *Morris v. Livie*, 11 L. J. Ch. 172; *Ansley v. Cotton*, 16 L. J. Ch. 55; *In re Johnston*; *Cockerell v. Earl of Essex*, 26 Ch. D. 538.

A direction to pay the legacy duty on the legacies and bequests given by the testator has been held not to include the duty on the proceeds of sale of realty directed to be sold and held on certain trusts. *White v. Lake*, 6 Eq. 188.

Free from
deductions.

Legacies given free from deduction or free from expense, or free from charge or liability, are free from duty. *Barksdale v. Gilliatt*, 1 Sw. 652; *Courtoy v. Vincent*, T. & R. 433; *Gosden v. Dotterill*, 1 M. & K. 56; *Louch v. Peters*, 1 M. & K. 489; *Warbrick v. Varley*, 30 B. 241; see *Stow v. Davenport*, 5 B. & Ad. 357; 2 Nev. & M. 835; and see *Turner v. Mullineux*, 1 J. & H. 334.

Gift of a
"clear" sum.

A gift of a clear sum or annuity is a gift clear of legacy duty. *Gude v. Mumford*, 2 Y. & C. Ex. 448; *Haynes v. Haynes*, 3 D. M. & G. 590; *In re Currie*; *Bjorkman v. Lord Kimberley*, 57 L. J. Ch. 743; 59 L. T. 200; 36 W. R. 752.

This is the case although in another part of the will a clear yearly sum is expressed to be given free of legacy duty. *Re Robins*; *Nelson v. Robins*, 58 L. T. 382.

So is a gift of a fund to produce a clear annual sum, which sum is to be paid to the legatee. *Morris v. Burton*, 11 Sim. 161; *Cole's Will*, 8 Eq. 271.

But a gift of a fund to produce a clear annual sum, and to pay the dividends of the stock, and not the exact sum to the legatee, is not a gift free from legacy duty, the term clear being referred to the costs of investment. *Banks v. Braithwaite*, 32 L. J. Ch. 35; *Sanders v. Kiddell*, 7 Sim. 536; *Pridie v. Field*, 19 B. 497.

And a gift to employés of their "full salary" is not free from legacy duty, the word full being referred to incidental deductions.

In re Marcus; *Marcus v. Marcus*, 56 L. J. Ch. 830; 57 Chap. XVII.
L. T. 399.

A direction to pay an annuity free from deduction or abate- Income tax.
ment will not release the legatee from paying income tax, unless
the testator shows that he regards income tax as a deduction.
Abadam v. Abadam, 12 W. R. 615; 33 B. 475; *Turner v.*
Mullineux, 1 J. & H. 334; *Sadler v. Rickards*, 4 K. & J. 302;
Peareth v. Marriott, 22 Ch. D. 182; *Gleadow v. Leetham*, 22
Ch. D. 269; *In re Buckle*; *Williams v. Marson*, (1894) 1 Ch.
286.

But the testator may by proper words direct the income tax
upon an annuity to be paid out of his estate. *Festing v. Taylor*,
11 W. R. 70; 3 B. & S. 217, 235; *Lord Lovat v. Duchess of*
Leeds, 10 W. R. 397; 2 Dr. & Sm. 262; *In re Bannerman's*
Estate; *Bannerman v. Young*, 21 Ch. D. 105.

CHAPTER XVIII.

AS TO THE MEANING OF CERTAIN WORDS.

Chap. XVIII. MONEY includes bank notes (a), money at the bank on a current account as well as on deposit (b), money in the hands of an agent of the testator (c), apparently arrears of a superannuation allowance from government, and money payable by a friendly society for funeral expenses (d), and any money, of which at the time of the testator's death, he might have claimed immediate payment (e). *Chapman v. Hart*, 1 Ves. Sen. 271 (a); *Manning v. Purcell*, 7 D. M. & G. 55 (b); *Ogle v. Knipe*, 8 Eq. 434 (c); *Collins v. Collins*, 12 Eq. 455 (d); *Byrom v. Brandreth*, 16 Eq. 475 (e).

What it does
not include.

It will not pass an apportioned part of an annuity nor accruing interest or dividends (a), nor money deposited with a stakeholder to abide the event of a bet (b), nor money due on a current account from a salesmaster (c), nor a legacy not acknowledged to be at the testator's disposal (d), nor stock in the funds (e), nor a sum due to the testator (f). *Byrom v. Brandreth*, 16 Eq. 475; see *Re Beavan*; *Beavan v. Beavan*, 53 L. T. 245 (a); *Manning v. Purcell*, 7 D. M. & G. 55 (b); *Smith v. Butler*, 3 J. & L. 565; *De Roebuck v. Lord Cloncurry*, 1 R. 5 Eq. 588 (c); *Byrom v. Brandreth*, 16 Eq. 475 (d); *Hotham v. Sutton*, 15 Ves. 319; *Gosden v. Dotterill*, 1 M. & K. 56; *Ommaney v. Butcher*, T. & R. 260; *Lowe v. Thomas, Kay*, 369; 5 D. M. & G. 315; *Collins v. Collins*, 12 Eq. 455 (e); *Dillon v. M'Donnell*, 7 L. R. Ir. 335 (f).

Money will, however, pass stock where there is at the date of the will and the death no money properly so called; or where stock is expressly referred to as money. *Chapman v. Reynolds*, 28 B. 221; *Newman v. Newman*, 26 B. 218.

In some cases a larger sense has been given to the term money, and it has been held to pass the residuary personalty: Chap. XVIII.

1. It is clear that a gift of "the whole of my money" will only pass money properly so called, though there may be very little of it, and it is given for life with remainders, at any rate where the gift is followed by specific or general bequests. *Lowe v. Thomas, Kay*, 369; 5 D. M. & G. 315; *Larner v. Larner*, 3 Dr. 704. When the word money will pass the residue.

So, too, money must be construed strictly where it is used as one of several terms of description, showing that it was not alone meant to pass the personal estate. *Cowling v. Cowling*, 26 B. 449; see *In bonis Aston*, 30 W. R. 92.

2. But where the testator declared himself desirous of making a settlement of his affairs, and appointed executors to take and receive all moneys in his possession or due to him, the whole personal estate was held to pass. *Waite v. Combes*, 5 De G. & S. 676.

And in *Prichard v. Prichard*, 11 Eq. 232, the whole personal estate was held to pass under a gift of the "income of my principal money" to A. for life, and afterwards to be divided among her children, apparently on the ground that there was only a sum of 239*l.* money proper at the testator's death. See *Cooke v. Wagster*, 2 Sm. & G. 296.

And in *In re Cadogan*; *Cadogan v. Palagi*, 25 Ch. D. 154, the whole personal estate passed under a gift of "one half of the money of which I am possessed" to A., "and the remainder to" B. See, too, *In re Townley*; *Townley v. Townley*, 32 W. R. 549.

When there is a direction to pay debts, or legacies have been given, and the residue of money is then given, the whole personal estate will pass. The general personalty being liable to pay debts and legacies, the residue must be a residue *ejusdem generis*. *Lynn v. Kerridge*, West. Rep. tem. Hard. 172; *Legge v. Asgill*, T. & R. 265, n.; *Rogers v. Thomas*, 2 Kee. 8; *Dowson v. Gaskoin*, *ib.* 14; *Stocks v. Barré*, Jo. 54; *Barrett v. White*, 24 L. J. Ch. 724; 1 Jur. N. S. 652; *Grosvenor v. Durston*, 25 B. 99; *In bonis White*, 7 P. D. 65; *In re Hart*; *Hart v. Hernandez*, 52 L. T. 217. See, too, *Langdale v.* Gift of residue of money after payment of debts and legacies.

Chap. XVIII. *Whitfield*, 4 K. & J. 426; *Re Maclean*; *Williams v. Nelson*, 11 T. L. R. 82.

In such a case the fact that a specific legacy is afterwards given makes no difference. *Montagu v. Earl of Sandwich*, 33 B. 324; *In re Pringle*; *Walker v. Stuart*, 17 Ch. D. 819.

Similarly, where the testator gave his money and goods to his wife for life, and at her death bequeathed certain legacies and the remainder of his property, the money was held to include the personal estate, as the testator showed that he was disposing at his wife's death of the same property as he meant her to have for life. *Glendening v. Glendening*, 9 B. 324.

A gift of "the rest of my money however invested" has been held to pass the residuary personal estate. *In re Pringle*; *Walker v. Stuart*, 17 Ch. D. 819.

Of course, if there is an express gift of residue, money must be construed in its strict sense. *Willis v. Plaskett*, 4 B. 208.

See as to the meaning of a direction to pay debts out of money, when there is a residuary bequest, *Lloyd v. Lloyd*, 54 L. T. 841; 34 W. R. 608.

And a gift by codicil of "all moneys that may be left after my decease" where there is a gift of residue in the will, passes only money properly so called. *Williams v. Williams*, 8 Ch. D. 789.

Ready
money, &c.

Such words as "ready money" (a), or "money to my account" (b), or "money in bonds or consols or anything else" (c), or money referred to as "cash" (d), would require a very strong context to pass more than would be included in the words if taken in the ordinary sense. *Re Powell*, Jo. 49; *Bevan v. Bevan*, 5 L. R. Ir. 57 (a); *Hastings v. Hane*, 6 Sim. 67 (b); *Stooke v. Stooke*, 35 B. 396 (c); *Nevinson v. Lady Lennard*, 34 B. 487 (d); see *In re Sutton*; *Stone v. A.-G.*, 28 Ch. D. 464.

Money "of
or to which
I may be
possessed or
entitled."

"Money of or to which the testator may be possessed or entitled," will include moneys due on security or otherwise. *Langdale v. Whitfield*, 4 K. & J. 426; see *Wilkes v. Collin*, 8 Eq. 338.

Money due
and owing.

"Money due and owing at the testator's decease" will pass a balance at the bank (a), stock (b), damages recovered by the executor and unliquidated at the time of the death (c), money

receivable on a policy of insurance upon the testator's life (d), Chap. XVIII. and money due to the testator from an executor where the estate has been got in before the testator's death (e). *Carr v. Carr*, 1 Mer. 541 (a); *Waite v. Combes*, 5 De G. & S. 676 (b); *Bide v. Harrison*, 17 Eq. 76 (c); *Petty v. Wilson*, 4 Ch. 574 (d); *Bainbridge v. Bainbridge*, 9 Sim. 16 (e). See *Byrom v. Brandreth*, 16 Eq. 475.

Such words will not pass a distributive share in a residuary personal estate not proved to have been got in at the time of the death; nor money due on a contract of service not completed till after the testator's death. *Martin v. Hobson*, 8 Ch. 401; *Stephenson v. Dowson*, 3 B. 342. See *Collins v. Doyle*, 1 Russ. 135.

"Ready money" will pass money at call at a bank, or in the hands of an agent used as a banker. *Parker v. Marchant*, 1 Y. & C. C. 290; 1 Ph. 356; *Powell's Trust*, Jo. 49; *Vaisey v. Reynolds*, 5 Russ. 12; *Fryer v. Rankin*, 11 Sim. 55.

It will not pass notes of hand (a), nor debts due from an agent (b), or in the hands of a salesmaster (c), nor dividends not demanded (d), nor rent or interest due on a mortgage (e). *Powell's Trust*, Jo. 49 (a); *Parker v. Marchant*, 1 Y. & C. C. 290 (b); *Smith v. Butler*, 1 J. & L. 692 (c); *May v. Grove*, 3 De G. & S. 462 (d); *Fryer v. Rankin*, 11 Sim. 55 (e).

Similarly "cash" will not include bonds, long annuities or promissory notes. *Beales v. Crisford*, 13 Sim. 592.

A gift of "all I hold in the bank" has been held to pass deposit receipts and cash. *Townsend v. Townsend*, 1 L. R. Ir. 180.

As to the meaning of the words "money in the funds," see *Burnie v. Getting*, 2 Coll. 324; *Mangin v. Mangin*, 16 B. 300; *Ridge v. Newton*, 2 D. & War. 239; *Slingsby v. Grainger*, 7 H. L. 273; *Ellis v. Eden*, 23 B. 543; *Brown v. Brown*, 6 W. R. 613.

A bequest of funds "purchased" out of separate estate will not pass savings of separate estate at the bank. *Askew v. Rooth*, 17 Eq. 426.

Nor will a gift of "property bequeathed to me" pass property

Chap. XVIII. intended to be bequeathed to the testator, but in fact given to him by act *inter vivos*. *In re Armstrong*, 49 L. J. Ch. 53.

Securities for money.

"Securities for money" will not pass a balance on current account at the bank (a), money on a deposit account (b), shares (c), bank stock (d), mere debts (e), or money lent on mortgage where the legal estate is in trustees, and the testator is entitled only to the residue after certain payments (f). *Vaisey v. Reynolds*, 5 Russ. 12 (a); *Hopkins v. Abbott*, 19 Eq. 222 (b); *Huddleston v. Gouldbury*, 10 B. 547; *Turner v. Turner*, 21 L. J. Ch. 843; *M'Donnell v. Morrow*, 23 L. R. Ir. 591; see *Murphy v. Doyle*, 29 L. R. Ir. 333 (c); *Ogle v. Knipe*, 8 Eq. 434 (d); *Re Mason's Will*, 34 B. 494 (e); *Ogle v. Knipe*, *supra* (f).

But it passes a lien for unpaid purchase-money (a), consols (b), money lent on mortgage, the right to receive which is in the testator (c), and railway debenture stock (d). *Callow v. Callow*, 42 Ch. D. 550, distinguishing *Goold v. Teague*, 7 W. R. 84; 5 Jur. N. S. 116 (a); *Bescoby v. Pack*, 1 S. & St. 500; *Re Beavan*; *Beavan v. Beavan*, 53 L. T. 245 (b); *Ogle v. Knipe*, 8 Eq. 434 (c); *Re Beavan*; *Beavan v. Beavan*, 53 L. T. 245 (d).

An I. O. U. is not, but a promissory note is a security for money. *Barry v. Harding*, 1 J. & Lat. 475; *Re Beavan*; *Beavan v. Beavan*, 53 L. T. 245.

As to the meaning of securities for money and similar expressions, see also *Ogle v. Knipe*, 8 Eq. 434; *Earl Poulett v. Hood*, 35 B. 234.

Whether the legal estate in a mortgage passes.

In cases of death before the 1st of January, 1882 (see the Conveyancing Act, sect. 30), the term securities for money passes the legal estate in mortgaged property whether there are words of limitation or not. *King's Mortgage*, 5 De G. & S. 644; *Ex parte Barber*, 5 Sim. 451; *Mather v. Thomas*, 6 Sim. 115; 10 Bing. 44; 3 M. & Sc. 687; *Rippen v. Priest*, 13 C. B. N. S. 308.

This is the case though the subject matter of the gift is expressly made subject to payment of debts, a direction inapplicable to the legal estate. *Re Field*, 9 Ha. 414; *Knight v.*

Robinson, 2 K. & J. 503; overruling *Silvester v. Jarman*, 10 Chap. XVIII. Pr. 78.

It seems the fact that the gift is to several persons as tenants in common, would not prevent the legal estate from passing. *Ex parte Whiteacre*, cited 1 Sand. on Uses, 359 n.; 1 Jar. 649.

Mortgages on real security do not include mortgages of turnpike road tolls and of turnpike road toll-houses. *Cavendish v. Cavendish*, 24 Ch. D. 685; 80 Ch. D. 227. Mortgages on real security.

It seems doubtful whether, before the Conveyancing Act, the term "money on security" would by itself pass the legal estate in mortgaged property; but it did if the donee was to receive the money on security, &c. *Re Cautley*, 17 Jur. 124; 92 L. J. Ch. 391; *Doe d. Guest v. Bennett*, 6 Ex. 892; *Arrow-smith's Trust*, 27 L. J. Ch. 704; 4 Jur. N. S. 1123; see *Brown v. Brown*, 6 W. R. 613. Money on security.

Possibly the expression rights and credits might pass the personal estate. *Hutchinson v. Hutchinson*, 13 Ir. Eq. 332. Rights and credits.

A gift to A. of the debts due from him to the testator means the debts remaining after deducting a debt due from the testator to A. *Ekins v. Morris*, 8 W. R. 301; *Ganly v. Dowling*, 5 L. R. Ir. 628. Debts.

Book debts appear to mean the amount due to the testator after deducting trade debts and private debts due from him. *Chick v. Blackmore*, 2 Sm. & G. 274. Book debts. •

A gift to A. of a debt due from him means a debt due from him solely if there is such a debt, and not a debt due from the firm to which A. belongs. *Ex parte Kirk*; *In re Bennett*, 5 Ch. D. 800.

In the same way a bequest of a debt due to the testator from A. would naturally mean a debt due to the testator alone, and not the testator's share of a debt due from A. to the testator's firm, though it may have that meaning if there is no debt due to the testator solely. *Maybery v. Brooking*, 7 D. M. & G. 673.

A direction to pay the testator's debts, including a debt of a certain amount owing to A. where the amount of the debt is overstated, will not entitle A. to receive more than the amount strictly owing. *Wilson v. Morley*, 5 Ch. D. 776.

A bequest of a certain sum described as the amount in which

Chap. XVIII. the legatee is indebted to the testator would entitle the legatee to the sum given, though the debt may be paid before the death of the testator. *Vickers v. Pound*, 6 H. L. 885.

A direction that a debtor is to be released from all claims in respect of moneys "now owing" to the testator, and all other moneys due from him, will release the debtor from advances made subsequent to the date of the will. *Everett v. Everett*, 7 Ch. D. 428: see p. 106.

Railway
shares.

Under the description railway shares, shares and stock will pass together. *Morrice v. Aylmer*, L. R. 10 Ch. 148; *ib.* 7 H. L. 717, overruling *Oakes v. Oakes*, 9 Ha. 666.

A gift of "shares" in a public company will not pass debentures (a) nor debenture stock (b). *Dillon v. Arkins*, 13 L. R. Ir. 557; 17 L. R. Ir. 636 (a). *In re Bodman*; *Bodman v. Bodman*, (1891) 3 Ch. 135 (b).

Mining
shares.

As to the meaning of mining shares, see *Duchess of Cleveland v. Meyrick*, 37 L. J. Ch. 125.

Foreign
bonds.

Foreign bonds will not include colonial bonds. *Hull v. Hill*, 4 Ch. D. 97; and see *Cadett v. Earle*, 46 L. J. Ch. 798.

Plate.

A gift of plate does not include plated articles. *Holden v. Ramsbottom*, 4 Giff. 205.

Furniture.

Furniture *prima facie* includes only such furniture as is reserved for domestic or personal use. *Le Farrant v. Spencer*, 1 Ves. Sen. 97; *Pratt v. Jackson*, 2 P. W. 302; 1 B. P. C. 222; *Manning v. Purcell*, 2 Sm. & G. 284; 7 D. M. & G. 55; *Domville v. Taylor*, 32 B. 604; *Manton v. Tabois*, 30 Ch. D. 92.

It includes plate and pictures and probably ornaments; but not wine or books or tenant's fixtures or an altar stone and relics. *Kelly v. Powlett*, Amb. 605; *Porter v. Tournay*, 3 Ves. 311; *Field v. Peckett*, 9 W. R. 526; *Finney v. Grice*, 10 Ch. D. 13; *In re Londesborough*; *Bridgman v. Fitzgerald*, 50 L. J. Ch. 9; see, too, *Cole v. Fitzgerald*, 1 S. & St. 189; 3 Russ. 301; *Birch v. Dawson*, 2 A. & E. 37; *Petre v. Ferrers*, 61 L. J. Ch. 426; 65 L. T. 568.

A gift of furniture in a house passes only the furniture permanently kept there. *Wilkins v. Jodrell*, 11 W. R. 588.

Effects.

Effects in a gift of furniture and effects, or of effects following

an enumeration of chattels personal will in general be restricted Chap. XVIII.
to things *ejusdem generis* as those described by the words which it follows. It has been held under such circumstances not to include jewellery (a) or bank-notes, stock-receipts, and certificates of railway stock (b), but to include wine (c). *Northey v. Paxton*, 60 L. T. 30; *Re Miller*; *Daniel v. Daniel*, 61 L. T. 365 (a). *Re Miller, supra* (b); *Re Bourne*; *Bourne v. Brandreth*, 58 L. T. 537 (c).

But a gift of all other effects, following an enumeration of specific things, may pass the residuary personalty where there is no other residuary gift. *In bonis Jupp*, (1891) P. 300; *Re Parrott*; *Parrott v. Parrott*, 53 L. T. 12.

A gift of household goods or household furniture where the testator has furniture at his private house, and also at his place of business, does not pass the latter. *Pratt v. Jackson*, 2 P. W. 302; 1 B. P. C. 222; *Le Farrant v. Spencer*, 1 Ves. Sen. 97; *Manning v. Purcell*, 7 D. M. & G. 55. Household goods.

"Objects of virtu or taste" would not, as a general rule, include valuable pictures. *In re Londesborough*; *Bridgman v. Fitzgerald*, 50 L. J. Ch. 9. Objects of virtu.

A bequest of chattels in a house will not pass choses in action, such as bonds or securities for money in the house, which are considered not property in the house, but evidence of title to property elsewhere. *Green v. Symonds*, 1 B. C. C. 139; *Lady Aylesbury's Case*, 11 Ves. 662; *Chapman v. Hart*, 1 Ves. Sen. 271; *Moore v. Moore*, 1 B. C. C. 127; *Fleming v. Brook*, 1 Sch. & L. 318; *Brooke v. Turner*, 7 Sim. 671; *Hertford v. Lowther*, 7 B. 1; see *Re Miller*; *Daniel v. Daniel*, 61 L. T. 365. Chattels in a house.

Bank notes will pass under such a bequest. *Popham v. Lady Aylesbury*, Amb. 68; *Brooke v. Turner, supra*.

A gift of articles in or about the testator's mill has been held not to pass a cargo of wheat in course of transit at the testator's death. *Lane v. Sewell*, 43 L. J. Ch. 378.

The expression property used with reference to a locality has a wider meaning than goods and chattels in a locality. Property in a locality.

Thus "my property in England," would include money in the funds, debts owing in England, arrears of a pension and the like. *Arnold v. Arnold*, 2 M. & K. 365.

Chap. XVIII.

So a gift of property in a particular county or in a foreign country, passes debts owing by persons living there. *Earl of Tyrone v. Marquis of Waterford*, 1 D. F. & J. 613; *Guthrie v. Walrond*, 22 Ch. D. 573.

So a gift of property at a bank was held to pass a cash balance, and also French inscribed rentes and railway shares, "nominatives" and "au porteur," the certificates for which were at the bank. *In re Prater*; *Desinge v. Beare*, 37 Ch. D. 481.

And a gift of a desk "with the contents thereof" passes coin, bank notes, a deposit receipt, cheques to the testator's order and promissory notes. *In re Robson*; *Robson v. Hamilton*, (1891) 2 Ch. 559.

Emblements.

The devisee of land is entitled to the emblements, unless they are expressly given away, and a general residuary bequest is not sufficient for this purpose. *Cooper v. Woolfit*, 5 W. R. 790; 2 H. & N. 122; see *Blake v. Gibbs*, 5 Russ. 13 n.

Farming stock.

Under the term stock, growing crops will pass to the devisee of the land where they grow. *Blake v. Gibbs*, 5 Russ. 13 n.

If the farm is devised to A. and the stock to B., growing crops will pass to B. whether the gift of the stock is coupled with the general personal estate or not. *Cox v. Godsalve*, 6 East, 604 n.; *West v. Moore*, 8 East, 339; *Rudge v. Winnall*, 12 B. 357; *In re Rooss*; *Evans v. Williamson*, 17 Ch. D. 696, overruling *Vaisey v. Reynolds*, 5 Russ. 12; and see *Harvey v. Harvey*, 32 B. 441; *Creugh v. Creugh*, 13 Ir. Ch. 28; *Burbidge v. Burbidge*, 16 W. R. 76.

Live and dead stock.

As to live and dead stock, see *Hutchinson v. Smith*, 11 W. R. 417.

Business.

A direction to transfer a business to a son at twenty-one, has been held not to include a freehold shop where the business was conducted. *In re Henton*; *Henton v. Henton*, 30 W. R. 702; see *Devitt v. Kearney*, 13 L. R. Ir. 45.

Goodwill.

The term goodwill *primâ facie* does not carry the freehold or leasehold premises where the business is carried on. But goodwill has been defined, as the "probability that the old customers will resort to the old place." Per Lord Eldon in *Cruttwell v. Lye*, 17 Ves. 335, 346. And goodwill may upon the context pass the business premises.

Thus a gift of plant and goodwill has been held to carry the leasehold business premises. *Blake v. Shaw*, Jo. 732. Chap. XVIII.

The expressions "plant," and "business and goodwill," do not include stock in trade. *Blake v. Shaw*, Jo. 732; *Delany v. Delany*, 15 L. R. Ir. 55. Plant,
business and
goodwill.

A gift of the testator's business and goodwill does not pass the capital in the business nor the book debts. *Delany v. Delany*, 15 L. R. Ir. 55.

A gift of the testator's capital in a business includes a debt due from a partner. *Bevan v. A.-G.*, 3 Giff. 361.

A gift of the testator's share right and interest in a partnership, does not pass a debt due to the testator from the partnership. *In re Beard*; *Simpson v. Beard*, 57 L. J. Ch. 887; 58 L. T. 629; 36 W. R. 519.

A bequest by a barge builder of his business and stock in trade, will pass old barges taken in part payment for new barges, and subsequently let out on hire. *Richardson v. Pilliner*, 50 L. J. Ch. 488. Stock in
trade.

Upon the question whether a bequest of the stock in trade of a carriage builder will pass an unfinished carriage, see *Elliott v. Elliott*, 9 M. & W. 23.

For the meaning of the word patrimony, see *Green v. Giles*, Patrimony. 5 Ir. Ch. 25.

The word legacy is primarily applicable to personalty only. Legacy.

It does not apply to land given on trust for sale and division, but it does to a legacy charged on real estate. *White v. Lake*, 6 Eq. 188; *Hodges v. Grant*, 4 Eq. 140; see *In re King's Trust*, 29 L. R. Ir. 401.

But it may refer to realty if there is nothing else to which it can refer. *Hope d. Brown v. Taylor*, 1 Burr. 268; *Hurdacre v. Nash*, 5 T. R. 716; see *Jackson v. Hosie*, 27 L. R. Ir. 450.

Similarly, the appointment of a residuary legatee will only give him personal property. *Windus v. Windus*, 21 B. 373; 6 D. M. & G. 549; *Hillas v. Hillas*, 10 Ir. Eq. 134; *Re Giles*, 14 Ir. Ch. 311; *Kellett v. Kellett*, 3 Dow, 248; *Cooney v. Nicholls*, 7 L. R. Ir. 107; *Gethin v. Allen*, 23 L. R. Ir. 236; *In re Morris*; *Morris v. Atherden*, 71 L. T. 179. Legatee.

But the appointment of a person "residuary legatee of all my When the

Chap. XVIII. *property*" will give him realty. *Warren v. Newton*, Drury, 464; *Day v. Daveron*, 12 Sim. 200; *Davenport v. Coltman*, 9 M. & W. 481; 12 Sim. 588.

residuary
legatee takes
realty.

So, too, if the testator expresses an intention of disposing of all his real and personal estate, and then appoints a residuary legatee. *Pitman v. Stevens*, 15 East, 505.

Probably, if the testator, after making certain devises, appoints a residuary legatee, real estate would pass to him. At any rate, this is the case if the testator prefaces his will with the expression of an intention to dispose of his estate, which must mean his whole estate. *Hughes v. Pritchard*, 6 Ch. D. 24; *Re Salter*; *Farrant v. Carter*, 44 L. T. 603; see *In re Methuen and Blore's Contract*, 16 Ch. D. 696, where there was no previous devise of realty.

The testator may show that he includes realty in the residuary gift by a direction not to sell a house till the death of the tenant for life, on whose death the property becomes divisible among the residuary legatees. *Davenport v. Coltman*, 9 M. & W. 481.

When realty and personalty are made a mixed fund for the payment of legacies, it seems the residuary legatee will take everything that remains. *Evans v. Crosbie*, 15 Sim. 602; *Wildes v. Davies*, 1 Sm. & G. 475; see *post*, pp. 211—213.

So where there is an absolute direction to sell the testator's real estate and he disposes of the proceeds of his property, the appointment of a residuary legatee gives him the residue of the proceeds of sale of the realty. *Singleton v. Tomlinson*, 3 App. C. 404.

Annuities are
legacies.

The word legacies includes annuities. *Bromley v. Wright*, 7 Ha. 334; *Ward v. Grey*, 26 B. 485; *Mullins v. Smith*, 1 Dr. & S. 204; *Heath v. Weston*, 3 D. M. & G. 601; *Sibley v. Perry*, 7 Ves. 522.

And the term pecuniary legacies would also, it would seem, include annuities. *Gaskin v. Rogers*, L. R. 2 Eq. 284.

But if the testator expressly distinguishes between legatees and annuitants, legacies will not include annuities. *Gaskin v. Rogers*, *supra*; *Weldon v. Bradshaw*, L. R. 7 Eq. 168.

It seems the term legacy does not *primá facie* include a gift

of residue, though legatee would include a residuary legatee. Chap. XVIII.
Ward v. Grey, 26 B. 485; see *In re Elcom*; *Layborn v. Grover Wright*, (1894) 1 Ch. 303.

The term manor comprises the demesne lands, including the waste of the manor and the freehold inheritance of the customary lands held of the manor, the services of freehold tenants of the manor, and the right to hold a Court Baron and a customary Court. Manor.

There may also be included in the manor certain franchises, such as a Court leet, treasure trove, wreck of the sea, and the like. See *Elton on Copyholds*, p. 11.

The term of course includes allotments made to the lord under an Inclosure Act in respect of his right in the soil. Such lands are already parcel of the manor, and the effect of the inclosure is only to free them from customary and prescriptive rights. *Hicks v. Sallitt*, 2 W. R. 173; 3 D. M. & G. 782; see, too, *Williams v. Phillips*, 8 Q. B. D. 437.

Further, the word manor includes copyhold tenement of the manor, purchased by the lord, though the lord's equitable title may not be perfect. *Hicks v. Sallitt*, *supra*.

Freehold lands held of the manor may again become parcel of the manor by escheat. *Delacherois v. Delacherois*, 13 W. R. 24; 11 H. L. 62.

But freehold lands held of the manor and purchased by the lord do not thereby become parcel of the manor, so as to pass by the description manor, though no doubt they might become parcel of the manor by reputation. *Delacherois v. Delacherois*, *supra*; *R. v. Duchess of Buccleuch*, 6 Mod. 151. Manor does not include purchased freeholds.

A devise, under a power, of the surface to A. and the mines to B. carries to A. accumulations of rent down to the testator's death derived from the mines under a lease under the Settled Estates Act, the money being subject to investment in land under the Act. *In re Scarth*, 10 Ch. D. 499. Rents from mines.

If an advowson is directed to be sold, and the proceeds invested for the benefit of a tenant for life, the tenant for life is entitled to present upon a vacancy occurring before sale. *Briggs v. Sharp*, 20 Eq. 317. Advowson.

If the proceeds of sale are divisible among tenants in common,

Chap. XVIII. the right of presentation before the advowson is sold will be determined by lot. *Johnstone v. Baber*, 4 W. R. 827; 6 D. M. & G. 439.

A devise of hereditaments situate in A. will not pass an advowson, if there is property to which the devise may apply. *Crompton v. Jurratt*, 30 Ch. D. 298, where the early cases *Anon.* 3 Dyer, 323 b. and *Kensey v. Langham*, Ca. t. Talb. 143 are discussed.

Living. The word living may mean the advowson or the next presentation. If the devise is coupled with words which contemplate personal enjoyment by the devisee, and there are no words of inheritance, the next presentation alone passes. *Webb v. Byng*, 4 W. R. 657; 2 K & J. 669.

Under a devise of lands and advowsons to trustees upon trusts to apply the profits during a given period to certain purposes, the proceeds of sale of a next presentation during that period are not undisposed of so as to pass to the heir at law. *Earl of Albemarle v. Rogers*, 7 B. P. C. 522; *Cust v. Middleton*, 13 W. R. 249.

Land. Though the word "land" is sufficient to pass land with buildings, it may be used in such a context as to exclude buildings.

Thus a devise of messuages and lands in A. and all other lands, meadows and pastures in B. does not pass houses in B., as the context shows that land is not used in its general sense. *Ewer v. Hayden*, Cro. El. 476, 658.

And a gift of "my cottage and all my land" at A. will not include a house with ten acres of land at A. subsequently purchased. *In re Portal and Lumb*, 30 Ch. D. 50.

Farm. The word "farm" passes both freehold, copyhold, and leasehold portions of the farm unless there is a context excluding one or the other. *Lane v. Stanhope*, 6 T. R. 345; *Doe d. Belasyse v. Earl of Lucan*, 9 East, 448; *Arkell v. Fletcher*, 10 Sim. 299; *Holmes v. Sayer Milward*, 47 L. J. Ch. 522.

Freehold. A devise of freehold land *prima facie* excludes leaseholds. *Stone v. Greening*, 13 Sm. 390; *Hall v. Fisher*, 1 Coll. 47; *Emuss v. Smith*, 2 De G. & S. 722; see *In re Bright-Smith*; *Bright-Smith v. Bright-Smith*, 31 Ch. D. 314.

But a devise of freehold land in a particular parish, when the testator had only leaseholds there, has been held to pass the leaseholds. *Day v. Trig*, 1 P. W. 286; *Doe d. Dunning v. Cranstoun*, 7 M. & W. 1. Chap. XVIII.

And this principle applies to wills executed since the Wills Act, under which freeholds acquired after the date of the will would pass. *Nelson v. Hopkins*, 21 L. J. Ch. 410.

And a devise of freehold land where the testator held, as to part, an underlease and the reversion in fee subject to the head lease was held to pass the leasehold interest as well as the reversion, the intention being that the whole property was to go together to the devisee. *Mathews v. Mathews*, 4 Eq. 278; see *Vallance v. Vallance*, 2 N. R. 229. Freehold and leasehold interest.

On the other hand where the testator was owner in fee of a house subject to a lease and also mortgagee of the lease, the mortgage debt was held not to pass by a devise of "my freehold house." *Bowen v. Barlow*, 11 Eq. 454; 8 Ch. 171; see *Wilkes v. Collin*, 8 Eq. 338.

A devise of freehold or leasehold ground rents passes the reversion. *Maundy v. Maundy*, 2 Stra. 1020; *Kaye v. Laxon*, 1 B. C. C. 76. Ground rents.

Under a devise of messuages in a particular parish freehold and leasehold messuages may pass together unless the limitations are only appropriate to freeholds or there is some other evidence of intention to exclude the leaseholds. *Thompson v. Lady Lawley*, 2 B. & P. 303; *Hobson v. Blackburn*, 1 M. & K. 571. Messuage.

The term messuage or house will pass the orchard, garden and curtilage. Co. Lit. 5 b; *Carden v. Tuck*, Cro. El. 89; 3 Leon. 214, pl. 283; see *Lombe v. Stoughton*, 18 L. J. Ch. 100; *Heach v. Prichard*, W. N. 1882, 140.

It will also pass a piece of land or a cellar severed from the house, but near it and necessary for the convenient use of it. See *Hibon v. Hibon*, 11 W. R. 455; 32 L. J. Ch. 374; *Doe v. Collins*, 2 T. R. 498; *Steele v. Midland Ry. Co.*, L. R. 1 Ch. 275, 289.

If the testator in one part of his will gives a house and lands, and in another part uses the word house only, probably the House.

Chap. XVIII. latter devise would not carry land occupied with the house. *Buck d. Whalley v. Nurton*, 1 B. & P. 53; see 1 Bing. 498; *Roe d. Walker v. Walker*, 3 B. & P. 375.

"The leasehold premises, 32, Prince's Gate," has been held to pass stables held with the house under a separate lease. *Mocatta v. Mocatta*, 49 L. T. 629.

Appurtenances.

A devise of a house with its appurtenances probably has no wider meaning than a devise of a house alone. Such a devise will pass everything naturally belonging to the enjoyment of the house, such as a garden and orchard and a small piece of land occupied with the house. *Boocher v. Samford*, Cro. El. 113; *Doe d. Lemprière v. Martin*, 2 W. Bl. 1148; *Buck d. Whalley v. Nurton*, 1 B. & P. 53; see *Willis v. Watney*, 51 L. J. Ch. 181 (yards).

But land will not pass as appurtenant to a house or to other lands. See Plowd. 169 *a*, 170; Co. Lit. 121 *b*; *Hearn v. Allen*, Cro. Car. 57; *Lister v. Pickford*, 34 B. 576; see *Cuthbert v. Robinson*, 30 W. R. 366.

If the devise is of certain property with the lands appertaining or belonging thereto, this is not to be taken in the strict sense of appurtenant, but in the sense of usually occupied therewith. *Hill v. Grange*, 1 Plow. 170; *Dyer*, 130 *b*; *Ongley v. Chambers*, 1 Bing. 483; *Doe d. Gore v. Langton*, 2 B. & Ald. 680.

Use and occupation.

Upon the construction of a complicated will a gift of the use and occupation of the testator's house was held to give a life interest only. *Coward v. Larkman*, 60 L. T. 1.

A gift of the use and occupation of a house does not involve a personal use so as to prevent the donee from letting. *Rabbeth v. Squire*, 4 De G. & J. 406; *Manno v. Greener*, 14 Eq. 456.

But a gift over, if the donee ceases to occupy the house shows that the testator contemplated a personal use. *Maclaren v. Stainton*, 27 L. J. Ch. 442; 4 Jur. N. S. 199.

A provision that the testator's widow might reside rent free in his residence did not in cases not affected by the Settled Land Act enable her to let the house, but she might reside there from time to time without forfeiting her right. *May v. May*, 44 L. T. 412.

The effect of sect. 51 of the Settled Land Act upon such gifts Chap. XVIII.
will be found discussed under conditions requiring residence,
post, p. 503.

A gift of the use of plate following a gift of other articles Use of plate.
to the same legatee in absolute terms has been held a gift
for life only. *Espinasse v. Luffingham*, 3 J. & L. 186.

For the meaning of a gift of the use of book debts and capital,
see *Terry v. Terry*, 12 W. R. 66.

A devise of a house as occupied by A. will not pass a merely Devise of a
house as
occupied
by A.
occasional easement enjoyed by A. over other property of the
testator, though the words "as enjoyed by A." might. *Polden*
v. Bastard, L. R. 1 Q. B. 156; *Bodenham v. Pritchard*, 1 B.
& C. 350.

Where a testator devises a piece of land to A., and another Right of way.
piece of land to B., and the only access to the latter is over the
former, B. is entitled to a right of way over A.'s land.

If the testator has himself used a certain way for purposes of
access to B.'s land, that will be the way to which A. is entitled.
Pearson v. Spencer, 1 B. & S. 571; 3 B. & S. 761.

If no way can be said to have been used by the testator for
the purpose of access to the land-locked land, it would seem
that the owner of the servient tenement would be entitled to
set out the way, subject to the restriction that taking all the
circumstances into consideration it must be a reasonable way.
See *Bolton v. Bolton*, 11 Ch. D. 968; and as to the user of
the way, see *Corporation of London v. Riggs*, 13 Ch. D.
798.

On the same principle where a testator devises to A. a house Right of light.
with windows, and to B. a field over which the light passes
which is required for the windows, the right to the light over
the field passes to A. *Phillips v. Low*, (1892) 1 Ch. 47.

The proper legal meaning of "the premises" is *præmissa*, Premises.
but it may be used in a popular sense as a description of certain
property, as in the phrase house and premises; in such a case it
will only include property in connection with the particular
property mentioned. *Sanford v. Irby*, 4 L. J. Ch. 23; *Leth-*
bridge v. Lethbridge, 3 D. F. & J. 523; 4 *ib.* 35; *Read v. Read*,
15 W. R. 165.

Chap. XVIII. The word "moiety" may be used as equivalent to share.
Moiety. *Morrow v. McConville*, 11 L. R. Ir. 236.

London. In a devise to the hospitals of London the expression London was held not to be confined to a definite area but to be used in a popular sense. *Wallace v. A.-G.*, 33 B. 384.

Option to purchase. Testators sometimes give options of purchasing a part of their property. Such an option may be personal to the beneficiary or it may be transmissible. *In re Cousins*; *Alexander v. Cross*, 30 Ch. D. 203.

If transmissible it must be so limited as not to transgress the rule against perpetuities.

The person to whom the option is given is entitled to have the property free from incumbrances. *Given v. Mussey*, 31 L. R. Ir. 126.

But he must comply strictly with the terms of the option, and if the option is to be exercised and the purchase-money paid within a given time, the option will be lost if this is not done, though there may be difficulties on the title or any other circumstance has caused delay. *Brooke v. Garrod*, 3 K. & J. 608; 2 De G. & J. 62.

If an offer is to be made by the executors and accepted within a given time, time does not run till a proper offer containing the terms is made. *Lord Lilford v. Powys Keck*, (No. 1), 30 B. 295; *Austin v. Twuney*, L. R. 2 Ch. 143.

It is a question to be determined on the facts of each case whether the person accepting the option is in the same position as an ordinary purchaser so that he may require an abstract of title or whether he must take the property as he finds it. See *Re Davison and Torrens*, 17 Ir. Ch. 7; *Given v. Mussey*; *Brooke v. Garrod*, *supra*.

A right of purchase at a fixed price is not destroyed by a compulsory purchase under the Lands Clauses Act after the testator's death. In such a case the person to whom the option is given may take the purchase-money less the fixed price. *In re Cant's Estate*, 4 De G. & J. 503; *In re Kerry*, W. N. 1889, 3.

WORDS APPROPRIATE TO REALTY AND PERSONALTY
RESPECTIVELY.

1. Under the words *personal* property, estate, and effects, Personal property alone passes. *Belaney v. Belaney*, L. R. 2 Eq. 210; 2 Ch. 138; *Jones v. Robinson*, 3 C. P. D. 344.

And possibly the word property would not pass realty if it is coupled with explanatory words relating only to personalty, such as "both in stock, household furniture, cash, &c., &c." *Mullally v. Welsh*, I. R. 6 C. L. 314; see 3 L. R. 1r. 244.

2. The words estate or property alone are, however, sufficient to carry real estate. *Mayor of Hamilton v. Hodsdon*, 6 Moo. P. C. 76; 11 Jur. 193; *Hawksworth v. Hawksworth*, 27 B. 1; *In re Smart's Estate*; *Fox v. Shipman*, W. N. 1882, 77; *In re Heginbotham*; *Wilson v. Heginbotham*, W. N. 1884, 179. Words estate or property alone will pass realty,

Where these words are coupled with other words which would alone be sufficient to carry the whole of the personal property, the word estate will, *prima facie*, carry realty, as it would otherwise be insensible. *Tilley v. Simpson*, 2 T. R. 659 n.; *Edwards v. Barnes*, 2 Bing. N. C. 252; *Doe d. Walls v. Langlands*, 14 East, 370; *Jongsma v. Jongsma*, 1 Cox, 362; *Patterson v. Huddart*, 17 B. 210; *Hamilton v. Buckmaster*, L. R. 3 Eq. 323; *Sanderson v. Dobson*, 7 C. B. 81, and 10 B. 47, overruling same case, 1 Ex. 141; and see *Dobson v. Bowness*, 5 Eq. 404; *Loftus v. Stoney*, 17 Ir. Ch. 178. where coupled with other words.

If there are any words in the gift accurately applicable to realty, such as "devise," the fact that the trusts declared are only applicable to personalty will not prevent the real estate from passing. *Doe d. Burkitt v. Chapman*, 1 H. Bl. 23; *Dunnage v. White*, 1 J. & W. 583; *Stokes v. Salomons*, 9 Ha. 75; *Lloyd v. Lloyd*, 7 Eq. 458; *Longley v. Longley*, 13 Eq. 133.

Real estate will pass even if there are no words technically appropriate, and the trusts declared are not literally applicable to realty, if they can be held popularly applicable. *Saumarez*

Chap. XVIII. v. *Saumarez*, 4 M. & Cr. 331; *D'Almaine v. Moseley*, 1 Drew. 632; *Morrison v. Hoppe*, 4 De G. & S. 234.

Thus the words "collect and get in" will not prevent realty from passing. *Hamilton v. Buckmaster*, L. R. 3 Eq. 323.

Trust for sale.

So, too, if the trust is for sale or investment, the inapplicability of the subsequent trusts to realty is immaterial. *O'Toole v. Browne*, 3 E. & B. 572; *Streatfield v. Cooper*, 27 B. 338; *Fullerton v. Martin*, 22 L. J. Ch. 893; *Dobson v. Bowness*, 5 Eq. 404. See, too, *Affleck v. James*, 17 Sim. 121.

If however, the gift is to trustees, their executors, administrators and assigns, on trusts exclusively applicable to personalty, real estate will not pass. *Doe d. Spearing v. Buckner*, 6 T. R. 610; *Pogson v. Thomas*, 6 Bing. N. C. 337; *Coard v. Holderness*, 20 B. 147.

Estate coupled with words insufficient to pass personalty.

It has sometimes been said, that if the words with which the word "estate" is coupled are not sufficient to carry all the personal property, estate will be confined to personalty. See *Tilley v. Simpson*, 2 T. R. 659 n.; *D'Almaine v. Moseley*, 1 Dr. 632. The rule appears, however, to be unsupported by actual decision, and has been disapproved of. See *Loftus v. Stoney*, 17 Ir. Ch. 178; *Re The Greenwich Hospital Improvement Act*, 20 B. 458.

At any rate, where there is a prior devise of lands a gift of the "rest and residue of my estate," or "all other my estate," though coupled with words which would not alone carry all the personalty, will carry realty. *Scott v. Alberry*, Com. 337; 8 Vin. Abr. 229, pl. 14; *Fletcher v. Smiton*, 2 T. R. 656.

Of course where the testator shows that he uses the word estate as equivalent to effects, only personalty will pass. *Time-well v. Perkins*, 2 Atk. 102; *Doe d. Hurrell v. Hurrell*, 5 B. & Ald. 18.

Real estate.

3. The words "real estate" *prima facie* do not include leaseholds, though leaseholds may pass if there is no real estate or an intention to include them can be gathered from the will. *Turner v. Turner*, 21 L. J. Ch. 843; *Gully v. Davis*, 10 Eq. 562; *Moase v. White*, 3 Ch. D. 763; *Butler*

v. *Butler*, 28 Ch. D. 66; *Re Davison*; *Greenwell v. Davison*, Chap. XVIII. 58 L. T. 304; *In re Uttermare*; *Leeson v. Foulis*, W. N. 1893, 158.

4. A devise of "real estate of which I may die seised" will Seised.
not pass lands which at the testator's death are in the wrongful possession of strangers. *Leach v. Jay*, 6 Ch. D. 496; 9 Ch. D. 42.

5. The words "whatever I may die possessed of" alone would What I may die possessed of.
probably carry realty.

At any rate this is clearly the case where they are coupled with words sufficient to carry the whole personalty. *Evans v. Jones*, 46 L. J. Ex. 280.

It makes no difference that the person to whom the gift is made is also appointed executor. *Pitman v. Stevens*, 15 East, 505; *Wilce v. Wilce*, 5 M. & P. 682; 7 Bing. 664; *Thomas v. Phelps*, 4 Russ. 348.

Monk v. Maudsley, 1 Sim. 286, and *Cook v. Jaggard*, L. R. 1 Ex. 125, were both cases before the Wills Act in which the question was whether the words, "whatever I die possessed of," would pass the fee to a devisee to whom specific devises for life and in tail had already been made.

6. The words "all the rest," though following gifts of per- All the rest.
sonalty, will pass realty. *Atree v. Atree*, 11 Eq. 280; *Smyth v. Smyth*, 8 Ch. D. 561.

7. The word effects *primâ facie* will not pass real estate. Effects.
Doe v. Dring, 2 Mau. & S. 448; *Doe d. Haw v. Earles*, 15 M. & W. 450: see, however, *Smyth v. Smyth*, *supra*; *A.-G. of British Honduras v. Bristowe*, 50 L. J. P. C. 15; *Hall v. Hall*, (1892) 1 Ch. 361.

But the testator may show that he intended realty to pass by the word effects, by referring, for instance, to property including realty as "such effects." *Marquis of Titchfield v. Horncastle*, 2 Jur. 610; *Milsome v. Long*, 3 Jur. N. S. 1073; see *In re Sheridan*, 17 L. R. Ir. 179.

The words "effects both real and personal" will pass realty. *Hogan v. Jackson*, 3 B. P. C. 388; Cowp. 299.

See as to the meaning of effects p. 164.

8. On the other hand, chattels real and personal *primâ facie* Chattels.
T.w.

Chap. XVIII. will not, unless explained by the context. *Grayson v. Atkinson*, 1 Wils. 333.

Worldly
goods.

9. The expression "worldly goods of what nature and kind soever" passes realty. *Wright v. Shelton*, 18 Jur. 445.

Appointment
of Executor.

10. The appointment of a person executor of the testator's property has been held sufficient to give him the fee in real estate. *Doe d. Hickman v. Haslewood*, 6 A. & E. 167; *Doe d. Pratt v. Pratt*, *ib.* 180; *Murphy v. Donnelly*, I. R. 4 Eq. 111.

CHAPTER XIX.

RESIDUARY GIFTS.

I. RESIDUARY DEVISES OF LAND.

A. *Freeholds.*

IN wills, prior to the Wills Act, a residuary devise included **Chap. XIX.**
only lands possessed by the testator at the date of his will, and
of which he had not attempted to make any disposition by his
will. Operation of
a general
devise on
freeholds
before the
Wills Act.

It included, therefore, the reversion in lands in which partial
interests only had been previously given. *Rooke v. Rooke*, 2
Vern. 461; 1 Eq. Ab. 210, pl. 17; *White v. Vitty*, 2 Russ.
484; 4 Russ. 584.

And in the case of contingent and executory devises it
included the interest undisposed of in the event of those devises
not taking effect, or until they took effect, but not lapsed or
void devises. *Doe d. Wells v. Scott*, 3 Mau. & S. 300; *Egerton*
v. Massey, 3 C. B. N. S. 338.

Now by sect. 25 of the Wills Act, real estate comprised in
any devise which shall fail or be void shall be included in a
residuary devise.

B. *Reversions.*

1. Reversions, whether vested in the testator at the time of
making his will or remaining in him after the limitations of his
will are exhausted, pass by a general devise of lands. *Chester*
v. Chester, 3 P. W. 56; *Doe d. Moreton v. Fossick*, 1 B. & Ad.
186; *Mostyn v. Champneys*, 1 Scott, 293; 1 Bing. N. C. 341. Reversions
pass under
a general
devise.

2. A devise of lands not settled, or out of settlement, is

Chap. XIX.

Devise of
lands not
settled in-
cludes a
reversion
in settled
lands,

equivalent to a devise of lands not otherwise disposed of, over which the testator has absolute dominion, and will therefore pass a reversion in fee in settled lands, though the testator may confirm the settlement. *Incorporated Society v. Richards*, 1 Dr. & War. 258; *Chester v. Chester*, 3 P. W. 56; *A.-G. v. Vigor*, 8 Ves. 256; *Jones v. Skinner*, 5 L. J. Ch. 87; *Kelly v. Duffy*, 4 L. R. Ir. 601; see *In re Green*; *Walsh v. Green*, 31 L. R. Ir. 338.

A charge of annuities upon the lands passing by the general words will not exclude reversions. *Doe d. Moreton v. Fossick*, 1 B. & Ad. 186; *Doe d. Pell v. Jeyes*, 1 B. & Ad. 593.

though some
of the limi-
tations are
inappropriate
to the rever-
sion.

3. The fact that the limitations on which the reversion is dependent are such that some of the limitations of the will cannot take effect upon the reversion, will not prevent the reversion from passing.

If there are other lands besides the reversion the limitations inapplicable to the reversion will be referred to the other lands *reddendo singula singulis*. *Doe d. Earl Cholmondeley v. Weatherby*, 11 East, 322; *William d. Hughes v. Thomas*, 12 East, 141; *Freeman v. Duke of Chandos*, Cowp. 363; *Doe d. Nethercote v. Bartle*, 5 B. & Ald. 492; *Morris v. Lloyd*, 33 L. J. Ex. 202.

And under this head would come all wills since the Wills Act, where such of the limitations as can never take effect upon the reversion may be looked upon as intended to operate upon after-acquired lands.

And even if there are no other lands the reversion will pass if some of the limitations of the will are applicable to it. *Church v. Mundy*, 12 Ves. 426; *Tennent v. Tennent*, Dru. temp. Sugden, 161; 1 Jo. & Lat. 379; *Ford v. Ford*, 6 Ha. 496; *Roe d. James v. Avis*, 4 T. R. 605. *Goodtitle d. Daniel v. Miles*, 6 East, 494, must be considered overruled.

Whether a
reversion
passes if all
the limita-
tions are in-
appropriate.

4. If, however, none of the limitations of the will could take effect upon the reversion, there seems no reason for supposing the reversion would pass. *Tennent v. Tennent*, *supra*, is not *contra*, since the devise of the reversion was capable of taking effect so far as the life interest given to R. was concerned. *Goodtitle d. Daniel v. Miles*, *supra*, seems to have been

decided upon this principle, though the facts did not justify its application. Chap. XIX.

5. And, of course, the reversion will not pass if the testator expressly treats it as undisposed of by his will; if, for instance, he treats the estates in which he has a reversion as descendible on failure of the prior limitations. *Strong v. Teatt*, 2 Burr. 912; 3 B. P. C. 219.

C. *Leaseholds for Lives.*

The same rules are applicable to leaseholds for lives, which, Leaseholds
for lives. being freehold interests, pass under a general devise though some of the limitations are inapplicable. *Fitzroy v. Howard*, 3 Russ. 225; *Weigall v. Broome*, 6 Sim. 99.

D. *Copyholds.*

By 55 Geo. 3, c. 192, and sects. 3 and 4 of the Wills Act, Copyholds. copyholds, whether surrendered to the use of the will or not, pass by a general devise. *Doe d. Clarke v. Ludlam*, 7 Bing. 275; 5 Moo. & P. 48.

The effect of section 3 of the Wills Act is only to dispense with the necessity for a surrender, and not to convey the estate into the devisee without admission. The estate therefore remains in the customary heir till admittance. *Garland v. Mead*, L. R. 6 Q. B. 441.

Before 55 Geo. 3, c. 192, equitable estates of copyholds Equitable
estates in
copyholds. which could not be surrendered could be devised by words of direct reference. *Allen v. Poulton*, 1 Ves. Sen. 121; but they did not pass by a general devise of lands; but now, as the evidence of intention to pass copyholds inferred from a surrender is unnecessary, it seems they would pass under a general devise. See *per* Lord Cranworth, in *Torre v. Browne*, 5 H. L. 555, 574.

And by the effect of sect. 3 of the Wills Act, a general devise of lands will pass copyholds, freed from the widow's right to freebench, in cases where the right could have been barred prior to the passing of that section by a surrender. *Lacey v. Hill*, 19 Eq. 346.

Chap. XIX.E. *Leaseholds for Years.*a. *Before the Wills Act.*

Leaseholds
for years
before the
Wills Act.

A general devise of lands before the Wills Act did not carry leaseholds for years if there were any freeholds; on the other hand, if there were no freeholds, leaseholds might pass. *Rose v. Bartlett*, Cro. Car. 292; *Thompson v. Lawley*, 2 B. & P. 303; *Gully v. Davis*, 10 Eq. 562.

Words of
description
applicable to
leaseholds.

But leaseholds passed under a gift of lands or of real estate, if there were any words applicable to them, or an intention could be gathered from the will that they were to be included. Thus leaseholds passed under the description lands which the testator "then stood seised or possessed of, or any ways interested in." *Addis v. Clement*, 2 P. W. 456.

The word "possessed" was considered the important word, and leaseholds did not pass under a similar devise without the word possessed. *Pistol v. Riccardson*, 2 P. W. 459 n.; *Davis v. Gibbs*, 3 P. W. 26.

And leaseholds passed where the devise was subject to ground rents or to certain persons to hold for ever, or otherwise according to the natures and tenures thereof. *Hartley v. Hurle*, 5 Ves. 540; *Swift v. Swift*, 1 D. F. & J. 160.

The same result followed if the lands were described by acreage, which could only be satisfied by including leaseholds. *Goodman v. Edwards*, 2 M. & K. 759.

b. *Since the Wills Act.*

S. 26 of the
Wills Act.

Sect. 26 of the Wills Act enacts that a devise of the land of the testator, or of the land of the testator in any place or in the occupation of any person mentioned in his will or otherwise described in a general manner and any other general devise, which would describe a customary copyhold or leasehold estate, if the testator had no freehold estate which could be described by it, shall be construed to include the customary copyhold and leasehold estates of the testator, or his customary copyhold and leasehold estates or any of them to which such description shall

extend as the case may be as well as freehold estates unless a contrary intention shall appear by the will. Chap. XIX.

The section was probably intended to do no more than to abolish the rule established by *Rose v. Bartlett* and other cases, and to leave the Court to ascertain the testator's intention unfettered by technical rules. See *Butler v. Butler*, 28 Ch. D. 75; *Re Davison*; *Greenwell v. Davison*, 58 L. T. 304.

The section is not limited to a devise of "land," but applies to any general devise. As to its application to a devise of "real estate" see *Butler v. Butler*, 28 Ch. D. 75; *Re Davison*; *Greenwell v. Davison*, 58 L. T. 304, and see p. 176.

A contrary intention within the meaning of sect. 26 is not shown by the fact that the "lands" in question are devised in strict settlement without any provision to prevent the leaseholds from vesting indefeasibly in the first tenant in tail at his birth. *Wilson v. Eden*, 11 B. 237; 5 Ex. 752; 14 B. 317; 18 Q. B. 474; 16 B. 153. Contrary intention.

But if there is a direction to accumulate the rents and profits during the minority of a tenant for life or in tail, and if he attains twenty-one to pay the accumulations to him, or if he dies under twenty-one to invest them in freehold land, to be settled to the same uses—a direction inconsistent with the absolute vesting of the leaseholds in a tenant in tail at birth,—and a power of selling the "lands" and investing the proceeds in leaseholds, to be settled upon the same trusts, but so that they shall not vest in any tenant in tail dying under twenty-one, and there is a gift of the residuary personal estate upon trusts corresponding with the uses of the devised lands with the same proviso against absolute vesting, the testator by the provisions against the vesting of leaseholds in any tenant in tail dying under twenty-one shows that he would have inserted similar provisions in the devise of the "lands," unless he had intended leaseholds not to pass under that name. *Prescott v. Barker*, 9 Ch. 174.

Chap. XIX.*F. Beneficial Interest in a Mortgage.*

Beneficial
interest in
a mortgage.

A general or specific devise of lands will not without more pass the beneficial interest in a mortgage. *Strode v. Russell*, 2 Vern. 621, 624; *Casborne v. Scarfe*, 1 Atk. 605; see 2 J. & W. 194. See *Martin d. Weston v. Mowlin*, 2 Burr. 969, where the testator was mortgagee in possession; *In re Clowes*, (1893) 1 Ch. 214.

But a devise of particular lands of which the testator is only mortgagee to several persons in succession, may pass the beneficial interest, as something was clearly intended to pass, and the limitations are inappropriate to a devise of the mere legal estate. *Woodhouse v. Meredith*, 1 Mer. 450. See, too, *Knollys v. Shepherd*, 1 J. & W. 499; *Clarke v. Abbott*, Barn. Ch. 457, 461; *In re Clowes*, (1893) 1 Ch. 214.

G. Trust and Mortgage Estates.

Trust and
mortgage
estates.

By sect. 30 of the Conveyancing and Law of Property Act, 1881, which applies to persons dying after the 31st of December, 1881, trust and mortgage estates vest in the personal representatives from time to time of the deceased, notwithstanding any testamentary disposition.

The section applies to copyholds. *Re Hughes*, W. N. 1884, 53.

Trust
copyholds of
inheritance
not to descend
as chattels
real.

Sect. 45 of the Copyhold Act, 1887 (50 & 51 Vict. c. 73), which became law on the 16th September, 1887, enacted that sect. 30 of the Conveyancing and Law of Property Act, 1881, should not apply to land of copyhold or customary tenure vested in the tenant on the Court rolls of any manor upon any trust, or by way of mortgage.

The effect of this section was considered in *In re Mill's Trusts*, 37 Ch. D. 312; 40 Ch. D. 14.

The Copyhold Act, 1887, is repealed by the Copyhold Act, 1894 (57 & 58 Vict. c. 46), but sect. 45 of the Act of 1887 is re-enacted by sect. 88 of the Act of 1894.

In cases where the Conveyancing Act does not apply the following propositions are deducible from the cases:

Legal estate

A general devise to a person absolutely without more will

pass the legal estate in property of which the testator is trustee or mortgagee. *Lord Braybrooke v. Inskip*, 8 Ves. 417. Chap. XIX.

There is, however, a distinction between cases where the testator is mortgagee in trust, and where he is also beneficially entitled to the mortgage money.

in trust and mortgage estates.

1. Where the testator has the legal estate in a mortgage, and the beneficial interest is also vested in him, the legal estate passes under a gift of "all the rest of my real and personal estate to A. for her own use and benefit," though there may be a charge of debts. *Re Stevens' Will*, 6 Eq. 597. In such a case it is reasonable to suppose that the beneficial ownership and the legal estate were meant to go together.

Where the testator is mortgagee and beneficially entitled to the mortgage money.

If the devise is to trustees, subject to a charge of debts, apparently the legal estate would not pass, the argument from the convenience of uniting the legal estate with the beneficial interest being away. *Re Horsfell*, M.C. & Y. 292.

This is *à fortiori* the case where the devise is to trustees subject to the payment of debts upon trusts inapplicable to the legal estate. See *Packman v. Moss*, 1 Ch. D. 215, where the testator was beneficially interested in a moiety of the equity of redemption.

But if the trustees are directed to get in debts due on any security, they take the legal estate. *Re Arrowsmith's Trusts*, 6 W. R. 642.

The legal estate will not pass where the devise is after payment of debts to two persons as tenants in common. *Doe d. Roylance v. Lightfoot*, 8 M. & W. 553.

Or where it is to several persons in definite shares, though not subject to debts. *Martin v. Laverton*, 9 Eq. 563.

Or where it is to an indefinite class, as tenants in common. *Re Finney's Estate*, 3 Giff. 465.

2. Mere trust estates will not be prevented from passing under a general devise by words of benefit superadded. *Bainbridge v. Lord Ashburton*, 2 Y. & C. Ex. 347; *Sharpe v. Sharpe*, 12 Jur. 398; *Lewis v. Mathews*, L. R. 2 Eq. 177; and see *Ex parte Shaw*, 8 Sim. 159.

Mere trust estates.

But they will not pass if there is a charge of debts, whether by express words or by implication from a residuary devise

Charge of debts.

Chap. XIX.

where legacies have been previously given. *Doe d. Reade v. Reade*, 8 T. R. 118; *Duke of Leeds v. Munday*, 3 Ves. 348; *Hope v. Liddell*, 21 B. 183; *In re Bellis' Trusts*, 5 Ch. D. 504. See, however, *In re Brown & Sibly*, 3 Ch. D. 156.

Trust for sale. Nor where the devise is on trust for sale. *Ex parte Marshall*, 9 Sim. 555; *Re Cautley*, 17 Jur. 124; *Morley's Will*, 10 Ha. 293; *In re Smith's Estate*, 4 Ch. D. 70.

Nor where the devise is to uses in strict settlement. *Thompson v. Grant*, 4 Mad. 438.

Separate use. As to whether a devise to the separate use will prevent trust estates from passing, see *Lindsell v. Thacker*, 12 Sim. 178.

Constructive trust. 3. Where a testator has contracted to sell real estate, so that he is a constructive trustee of the legal estate, it will pass under a devise of trust estates, and not under a general devise upon trust for sale. *Lysaght v. Edwards*, 2 Ch. D. 499. *Purser v. Darby*, 4 K. & J. 41, only decides that where the estate contracted to be sold is specifically devised it is excepted from a general devise of trust estates.

If there is no devise of trust estates, the legal estate in lands contracted to be sold will pass under a general devise of real and personal estate upon trust to get in and dispose of the personalty, the legal estate being required for the purpose of the trust. *Wall v. Bright*, 1 J. & W. 494; *Lysaght v. Edwards*, 2 Ch. D. 499, 515.

But it will not if the devise is to tenants in common with limitations over. *Thirtle v. Vaughan*, 24 L. T. 5; 2 W. R. 632.

A devise of mortgaged estates on trust to get in the mortgage debts will not pass a legal estate which has descended to the testator as heir of a deceased mortgagee. *Ex parte Morgan*, 10 Ves. 100.

II. RESIDUARY BEQUESTS.

A. What is a Residuary Gift.

No particular words necessary to pass the residue.

Such words as goods, chattels, or effects will, as a rule, pass the residuary personalty; no particular words are, however, necessary for that purpose. *Bland v. Lamb*, 2 J. & W. 399;

Hearne v. Wigginton, 6 Mad. 120; *Fleming v. Burrows*, 1 Russ. 276; *Leighton v. Baillie*, 3 M. & K. 267; *In re Bassett's Estate*; *Perkins v. Fladgate*, 14 Eq. 54; see *In bonis Aston*, 6 P. D. 203. Chap. XIX.

The question frequently arises whether words in themselves large enough to pass the residue, but coupled with an enumeration of particular things, will be cut down to pass only things *ejusdem generis* with those enumerated. Doctrine of *ejusdem generis*.

With regard to the meaning of *et cætera* following an enumeration of specific things, no precise rule can be laid down. The tendency of the most recent cases is to give the word the widest possible meaning, so that it would pass even real estate. *Chapman v. Chapman*, 4 Ch. D. 800; *Mullally v. Walsh*, 3 L. R. Ir. 244. Enumeration of particulars followed by *et cætera*.

On the other hand, in some of the earlier cases *et cætera* following an enumeration of particulars has been confined to things *ejusdem generis*. *Marquis of Hertford v. Lowther*, 7 B. 1; *Newman v. Newman*, 26 B. 220; *Barnaby v. Tassell*, 11 Eq. 363.

Where there are comprehensive words followed by an enumeration of particulars, an *et cætera* will not restrict the meaning of the large words. *Kendall v. Kendall*, 4 Russ. 360; *Gover v. Davis*, 29 B. 222. Large words followed by an enumeration of particulars.

Large words, such as goods, chattels or effects, when they are followed by an enumeration of particulars, will not be limited to things *ejusdem generis*. *Fisher v. Hepburn*, 14 B. 627; *Patterson v. Huddart*, 17 B. 210; *Ellis v. Selby*, 7 Sim. 352; 1 M. & Cr. 286; *Swinfen v. Swinfen*, 29 B. 207; *Avison v. Simpson*, Jo. 43.

The same is the case though the particulars are introduced by words intended to be explanatory of the former words, for instance, "namely," "consisting in," "together with," "such as," "both in," or similar words. *Bridges v. Bridges*, 8 Vin. Abr. Devise, 295, pl. 13; *Gover v. Davis*, 29 B. 222; *In bonis Goodyar*, 1 Sw. & Tr. 127; 4 Jur. N. S. 1243; *Mahony v. Donovan*, 14 Ir. Ch. 262, 388; *Drake v. Martin*, 23 B. 89; *Dean v. Gibson*, 3 Eq. 713; *Maberley's Trusts*, 19 W. R. 522; *King v. George*, 4 Ch. D. 435; 5 *ib.* 627; *In re Fleetwood*; Explanatory words.

Chap. XIX. *Sidgreaves v. Brewer*, 15 Ch. D. 594; *Mullally v. Walsh*, 3 L. R. Ir. 244; see *Kendall's Trust*, 14 B. 608; *Tighe v. Fetherstonhaugh*, 13 L. R. Ir. 401. *Timewell v. Perkins*, 2 Atk. 103 is not to be followed.

And the words "whether in money or in the public funds or other securities of any sort or kind whatsoever," have an enlarging rather than a restrictive force, so far as personal property is concerned. *Cambridge v. Rous*, 8 Ves. 12; see *Reeves v. Baker*, 18 B. 372.

So, where a testator gave his wife "all my property, leasehold and freehold, which I now possess," it was held that "leasehold and freehold" was added *ex abundanti cautela* and not to restrain the generality of the word "property." *Re Roberts; Kiff v. Roberts*, 55 L. J. Ch. 628; 54 L. T. 386; 55 L. T. 498; 35 W. R. 176.

Property in certain securities.

On the other hand, a gift of all the testator's property in certain securities is a gift of those securities only. *Enohin v. Wylie*, 1 D. F. & J. 410; 10 H. L. 1.

But such a gift may be enlarged to a residuary gift, if the testator goes on to state, that it is his intention to dispose of all his property among the legatees in question. *Patrick v. Yeatherd*, 12 W. R. 304.

Express inclusion of things which would have passed without mention.

It seems that the express inclusion in the large words of some particular property, which would have passed without being expressly included, affords an argument for excluding from the gift things *ejusdem generis* with that included. *Steignes v. Steignes*, Mos. 296.

Enumeration of particulars preceding large words will not restrict the latter.

General words following an enumeration of particulars will *prima facie* have their full force whether introduced by the word "other" or not, if a restricted construction would cause an intestacy. *Arnold v. Arnold*, 2 M. & K. 365; *Swinfen v. Swinfen*, 29 B. 207; *Campbell v. Prescott*, 15 Ves. 503; *Michell v. Michell*, 5 Mad. 69; *Martin v. Glover*, 1 Coll. 269; *Parker v. Marchant*, 1 Y. & C. C. 290; *Nugee v. Chapman*, 29 B. 290; *Hodgson v. Jex*, 2 Ch. D. 122; see, too, *Re Lloyd's Estate*, 2 Jur. N. S. 539; *Everall v. Browne*, 1 Sm. & G. 368; *In bonis Jupp* (1891), P. 300.

The fact that specific and general legacies are given in later

parts of the will is not sufficient to restrict the general words. *Chap. XIX.*
In bonis Sheppard, 48 L. J. P. 62.

It is immaterial that certain things which would have passed under the previous words, if read in their large sense, are subsequently given to the same legatee. *Bennett v. Batchelor*, 1 Ves. Jun. 63 ; 3 B. C. C. 27 ; *Fleming v. Burrows*, 1 Russ. 276.

It makes no difference, that the gift is not strictly residuary, so that there might possibly be property which it would be ineffectual to pass. *Hodgson v. Jex*, 2 Ch. D. 122.

The word article, however, has not the same large sense as goods or effects. *Collier v. Squire*, 3 Russ. 467.

But if it is clear that the gift was not meant to be residuary, and the large words, if not confined to things *ejusdem generis*, would carry the residue, they must be so confined. Large words confined to things *ejusdem generis*,

1. This is the case, if there is an express residuary gift. if there is another residuary gift,
Woolcomb v. Woolcomb, 3 P. W. 112 ; *Stuart v. Marquis of Bute*, 1 Dow, 84 ; *Lamphier v. Despard*, 2 Dr. & War. 59 ; *Mullins v. Smith*, 1 Dr. & Sm. 204 ; *Campbell v. M'Grain*, 1 R. 9 Eq. 397 ; *Waite v. Morland*, 13 W. R. 963 ; *Smith v. Davis*, 14 W. R. 942.

2. So when the residue has been given and the will is then revoked so far as relates to the bequest to the residuary legatee of the testatrix's plate, linen, household goods, and other effects, these words would be confined to things *ejusdem generis*. or it is clear that the gift in question was not meant to be residuary.
Hotham v. Sutton, 15 Ves. 319.

If, however, the revocation is of the same enumerated things and "other effects (except money)," the testatrix shows that she considered things not *ejusdem generis* would be included, and the large words will have their full force. *Hotham v. Sutton*, 15 Ves. 326 ; *Iverson v. Gassiot*, 3 D. M. & G. 958 ; see *Steignes v. Steignes*, Mos. 296. *Fleming v. Brook*, 1 Sch. & Lef. 318, is inconsistent with *Hotham v. Sutton*.

So, too, if something stated to be a portion of certain specific property, together with the testator's household furniture and effects of what nature or kind soever, is given to a legatee, and the testator then makes other gifts, the earlier gift being clearly not residuary will only pass things *ejusdem generis* with those enumerated. *Rawlings v. Jennings*, 13 Ves. 39.

Chap. XIX.

And it would seem that where there is a gift of certain articles and all other goods of whatever kind to a legatee at the commencement of a will, followed by dispositions of other portions of the testator's property, and the remainder of the latter property is given to the same legatee, it is clear that the first gift was not meant to be residuary. *Wrench v. Jutting*, 3 B. 521.

So, too, a gift of the remainder of the testator's money and effects to be expended in purchasing a suitable present for his godson must be read as limited to things *ejusdem generis* with money. *Borton v. Dunbar*, 1 Giff. 221; 2 D. F. & J. 338; 30 L. J. Ch. 8.

3. Or, again, the testator may show by subsequent reference or explanation that he meant only things *ejusdem generis* to pass. *Sutton v. Sharp*, 1 Russ. 149; see *A.-G. v. Wiltshire*, 16 Sim. 38.

Bequest of
things in a
house.

In the case of a bequest of things in a house where the house is also given to the legatee, general words following an enumeration of particulars will more readily be limited so as to pass only things *ejusdem generis*.

The mention of one particular class of things, coupled with general words, will not cut down the general words.

Thus under a bequest of furniture and other movable goods in a house, money will pass. *Swinfen v. Swinfen*, 29 B. 207; *Mahony v. Donovan*, 14 Ir. Ch. 262, 388; *Cole v. Fitzgerald*, 3 Russ. 301.

On the other hand, if there is a long enumeration of particulars, such as furniture, plate, linen, and the like, followed by general words, the general words will be confined to things *ejusdem generis*; so that, for instance, money in the house would not pass. *Trafford v. Berrige*, 1 Eq. Ab. 201, pl. 4; *Boon v. Cornforth*, 2 Ves. Sen. 278; *Campbell v. M'Grain*, 1 R. 9 Eq. 397; *Watson v. Arundel*, 1 R. 10 Eq. 299; see *Dutton v. Hockenhull*, 22 W. R. 701.

The argument in favour of a restricted construction of the general words is strengthened, if there is anything to show that the testator intended the chattels in question to be enjoyed with the house. *Gibbs v. Lawrence*, 7 Jur. N. S. 137; 30 L. J.

Ch. 171 ; *Bradish v. Ellames*, 13 W. R. 128 ; 10 Jur. N. S. Chap. XIX.
1170, 1231.

The same is the case, if the things given are annexed to the house as heirlooms, a term implying durability. *Hare v. Pryce*, 12 W. R. 1072 ; *Fitzgerald v. Field*, 1 Russ. 427.

And in a similar gift the fact that a pecuniary legacy is given to the same legatee will prevent money in the house from passing as goods and chattels. *Roberts v. Kuffin*, 2 Atk. 113 ; *Anon.* Prec. Ch. 8. See *In re Robson* ; *Robson v. Hamilton*, (1891) 2 Ch. 559. See, too, *ante*, p. 165.

B. What passes under a Residuary Gift.

Gifts of residue may be either gifts of the residue of a particular fund or they may be general residuary gifts. Gifts of the residue of a particular fund may be either gifts of the residue of a fund over which the testator has a power of appointment, or of a fund created by the testator for the purposes of his will. Residue distinguished.

1. As to the residue of an appointed fund :

A gift of the residue of a fund over which the testator has a power of appointment, if not specific (see *ante*, pp. 120, 121), passes shares in the fund the gift of which lapses or fails. *Falkner v. Butler*, Amb. 514 ; *Oke v. Heath*, 1 Ves. Sen. 134 ; see *Douglass v. Waddell*, 17 L. R. Ir. p. 384. Residue of appointed fund.

This is the case, though the share in question may be directed to fall into the residue in certain events, which do not happen. *In re Meredith's Trusts*, 3 Ch. D. 757.

It appears to be immaterial that the residue is given only after deducting or after payment of the sums already appointed. *Falkner v. Butler*, Amb. 514 ; *Carter v. Taggart*, 16 Sim. 423 ; *In re Harries' Trust*, Joh. 199. Residue "after payment" of legacies.

If it can be shown, that by the word residue the testator means no more than the precise sum which remains after the other gifts are provided for, the gift of the residue is in effect the gift of a specific sum, and will not carry lapsed shares. *In re Jeaffreson's Trusts*, L. R. 2 Eq. 276. Specific residue.

The case of *Easum v. Appleford*, 10 Sim. 274 ; 5 M. & Cr. 56, if it can be supported at all, must be supported on these grounds. See, too, *Lakin v. Lakin*, 13 W. R. 704.

Chap. XIX.

Residue of
specific part
of testator's
own property.

2. As to the residue of a particular portion of the testator's own property :

Where a testator disposes of part of his lands in a particular parish to A. and devises the residue of those lands to B., the devise to B. is specific, and will not carry a lapsed share. *In re Brown's Trusts*, 1 K. & J. 522 ; *Springett v. Jennings*, 6 Ch. 333.

Residue of
fund of
personalty.

In the case of personalty, where the testator cannot be supposed to have in his mind the distinct portions of which the property is composed, different rules apply. Thus, if he disposes of a particular portion of his personalty, and then gives the residue of that portion, whether it is described as residue not otherwise disposed of or after payment of the sums previously given, the particular residue passes shares in the property which lapse or are invalidly given. *De Trafford v. Tempest*, 21 B. 564 ; *Aston v. Wood*, 43 L. J. Ch. 715 ; *Champney v. Davy*, 11 Ch. D. 949 ; *In re Larking* ; *Larking v. Larking*, 34 Ch. D. 310 ; see *Fee v. M'Manus*, 15 L. R. Ir. 31.

A gift of particular residue "not specifically bequeathed" will not carry lapsed portions of the property, if there is a general residuary bequest, though the latter may be given with precisely the same words. *Patching v. Barnett*, 28 W. R. 886, 890.

General
residue and
residue of a
particular
fund.

Upon the question whether a gift of a residue is a gift of the general residue or only of the residue of a particular fund, see *Ommaney v. Butcher*, T. & R. 260 ; *Legge v. Asgill*, *ib.* 265 n. ; *Wrench v. Jutting*, 3 B. 521 ; *Boys v. Morgan*, 9 Sim. 289 ; 3 M. & Cr. 661 ; *Markham v. Ivatt*, 20 B. 579 ; *Jull v. Jacobs*, 3 Ch. D. 703.

3. As to a general residue :

General re-
siduary gift.

A general residuary gift passes everything not disposed of, whether the testator has not attempted to dispose of it, or whether the disposition fails by lapse or any other event. *Bernard v. Minshull*, Johns. 276 ; *Re Bagot* ; *Paton v. Ormerod*, (1893) 3 Ch. 348.

It also passes property attempted to be appointed. *Spooner's Trust*, 2 Sim. N. S. 129.

And a gift of general residue "not otherwise disposed of," or "not herein specifically bequeathed," will pass property not

effectually disposed of. *Green v. Dunn*, 20 B. 6; *De Trafford v. Tempest*, 21 B. 564; *Patching v. Barnett*, 28 W. R. 886, 890. Chap. XIX.

A residuary gift has even been held to include property directed to be considered as part of the testator's personal estate, and to go in a due course of administration. *Scott v. Moore*, 14 Sim. 35.

Under a residuary devise, from which the testatrix excepted the lands subject to the uses of her marriage settlement, under which she took an ultimate remainder in fee, it was held that the remainder in fee in lands conveyed to the uses of the settlement subsequently to the date of the will passed. *Hughes v. Jones*, 11 W. R. 898; see *Torrens v. Millington*, 26 W. R. 758.

A recital by the testator in his will that certain property is settled in a particular manner, though it is not so settled, does not prevent the property from passing under a gift of residue. *In re Bagot*; *Paton v. Ormerod*, (1893) 3 Ch. 348, overruling, so far as *contra*, *Circuit v. Perry*, 23 B. 275; *Harris v. Harris*, I. R. 3 Eq. 610; *Hawks v. Longridge*, 29 L. T. N. S. 449; *Clibborn v. Clibborn*, 9 Ir. Jur. 381. Recital of settlement.

The terms in which the residue is given may exclude certain property from it. Residue limited by restrictive words.

Thus, if the testator declares his intention of disposing of certain property by codicil, a gift of residue "not reserved to be disposed of by codicil" does not pass the reserved property if no disposition is made of it. *Davers v. Dewes*, 3 P. W. 40.

So, too, though a "small" balance would include any balance that may happen to remain after making the payments directed by the testator, a bequest of the "small remainder" will not include interests that lapse. *Page v. Young*, 19 Eq. 501; *A.-G. v. Johnstone*, Amb. 576; see *Bland v. Lamb*, 2 J. & W. 399. "Small remainder."

Where property is excepted from a residue, and the only object of the exception is to make a particular bequest, which fails, the excepted property falls into the residue. *Evans v. Jones*, 2 Coll. 516; *Wingfield v. Newton*, cit. 2 Coll. 520; *Thompson v. Whitelock*, 7 W. R. 625; 4 De G. & J. 490; see

Chap. XIX. *Tatham v. Vernon*, 29 B. 604; *Torrens v. Millington*, 26 W. R. 753; *Blight v. Hartnoll*, 23 Ch. D. 218.

Similarly, if the exception can be read as intended only to exclude the property from a trust for sale to which the residue is subject, the property excepted passes to the residuary legatees. *James v. Irving*, 10 B. 276; *Dobson v. Banks*, 32 B. 259.

On the other hand, if the residue is given charged with debts, and certain property is exonerated from the charge and excepted from the residue, it will not pass with the residue on failure of the particular bequest. *Wainman v. Field*, Kay, 507.

Residue of
residue.

Where the residue itself is distributed in certain shares, and a legacy is given out of one of the shares, followed by a disposition of the residue of such share, the legacy is undisposed of, if the legatee predeceases the testator. *Skrymsher v. Northcote*, 1 Sw. 566; *Lloyd v. Lloyd*, 4 B. 231.

So, where the residue is given as to one-fourth on trusts which fail, a gift of the residue of that residue will not carry the lapsed fourth. *Simmons v. Rudall*, 1 Sim. N. S. 115.

A bequest of residue beyond a sum of £10,000, directed to be set apart out of the residue, will not carry lapsed portions of the £10,000. *Green v. Pertwee*, 5 Ha. 249.

Revocation of
share of
residue.

Where the residue is given between several persons nomination as tenants in common, and the gift to one of them is revoked, the gift of that share lapses, whether the revocation be of the share or of the trusts of the will, so far as they relate to the share. *Cresswell v. Cheslyn*, 2 Ed. 123; *Ramsay v. Sheldine*, L. R. 1 Eq. 129; *Sykes v. Sykes*, 4 Eq. 200; 3 Ch. 301.

If a share is expressed to be revoked with a view to put the other residuary legatees on an equality with the one whose share is revoked, the revoked share passes to the others. *Vaudrey v. Howard*, 2 W. R. 32.

Where the residue is completely disposed of, and by a subsequent clause the testator directs that another person is to take a share, the effect of a revocation of the latter gift is to leave the earlier gift of the whole residue effectual. *Harris v. Davis*, 1 Coll. 416.

For the construction of a will where a residue was given to

legatees in proportion to their legacies, and the testator by a codicil revoked some of the legacies, and gave other legacies in substitution for them, see *In re Courtauld's Estate*; *Courtauld v. Carwston*, W. N. (1882), 185; and see, too, *Hall v. Severne*, 9 Sim. 515. Chap. XIX.

Where a testator revokes or alters a gift of a share of residue, and directs that the share, or the share subject to the alteration, shall fall into residue, there is no lapse, but the share is divisible amongst the other residuary legatees. *In re Palmer*; *Palmer v. Answorth*, (1893) 3 Ch. 369, overruling *Humble v. Shore*, 7 Ha. 247; 1 H. & M. 550. The cases in which *Humble v. Shore* was followed, *Lightfoot v. Burstall*, 1 H. & M. 546; *In re Barker's Estate*; *Hetherington v. Longridge*, 15 Ch. D. 635; *Re Bevis's Trusts*, 20 W. R. 359; and *In re Savage's Trusts*, 50 L. J. Ch. 131, must also be taken as overruled, as the principle of *In re Palmer* must extend to all directions that a share of residue which the will does not fully dispose of shall fall into residue. See also *Crawshaw v. Crawshaw*, 14 Ch. D. 817; 29 W. R. 68; *In re Rhoades*; *Lane v. Rhoades*, 29 Ch. D. 142; *In re Ballance*, 42 Ch. D. 62; *Re Owen*, 36 Sol. J. 539; *Holgate v. Jennings*, 37 Sol. J. 303. Direction that share of residue shall fall into residue.

Where one of the residuary legatees dies and the testator, by codicil, confirms the will, except as to any legacy lapsed, it has been held that the share of the deceased legatee is undisposed of. *Re Mary Wood's Will*, 29 B. 236.

III. EXECUTION OF GENERAL POWERS BY RESIDUARY GIFTS.

A. General Powers before the Wills Act.

In wills before the Wills Act a general devise did not, as a rule, carry lands over which the testator had a general power of appointment. *Hoste v. Blackman*, 6 Mad. 190; *Roake v. Denn*, 4 Bl. N. S. 1. Effect of a general devise on powers before the Wills Act.

But the lands subject to the power passed :

If there was a clear disposition of lands, and the testator had at the time no other lands. *Standen v. Standen*, 2 Ves. Jun. 589; 6 B. P. C. 193; *Denn v. Roake*, 6 Bing. 475; 5 B. & C. 732; see *In re Mills*; *Mills v. Mills*, 34 Ch. D. 186. As regards realty.

Chap. XIX.

It was necessary that there should be a clear disposition of lands, and not merely such general words as estate or property, though they would be sufficient to pass the proper lands of the testator. *Jones v. Curry*, 1 Sw. 66; *Evans v. Evans*, 23 B. 1.

The land subject to the power was allowed to pass only in order to give effect to the words of the will, and not because the testator had shown an intention to execute the power, and therefore only so much of the land subject to the power was allowed to pass as was sufficient to give effect to the words of the will. Thus, if a testator had freeholds and a power of appointment over freeholds and copyholds, a devise of his freeholds and copyholds passed only the copyholds and not the freeholds subject to the power. *Lewis v. Llewellyn*, T. & R. 104; *Napier v. Napier*, 1 Sim. 28.

But a gift of real and personal estate where the testator had no real estate, but had a power of appointing real and personal estate, passed both the real and personal estate subject to the power. *Standen v. Standen*, 2 Ves. Jun. 589; 6 B. P. C. 193.

As regards
personalty.

These rules were not applicable to personalty, since, though the testator might not at the time of the bequest have possessed any property but that subject to the power which could have passed under the bequest, it would have been effectual with regard to after-acquired property.

Therefore, if there was at the testator's death any property upon which the words of general gift could take effect, the power was not executed. *Jones v. Curry*, 1 Sw. 66; *Langham v. Nenny*, 3 Ves. 467; *Croft v. Slee*, 4 Ves. 60; *Bradley v. Westcott*, 13 Ves. 445; *Buckland v. Barton*, 2 H. Bl. 136; *Jones v. Tucker*, 2 Mer. 533.

If at his
death the
testator has
no property
but that sub-
ject to the
power.

It has also been said that even if there was at the testator's death no other property upon which the general words could operate, the power would nevertheless not be executed. In all the cases, however, cited in support of this proposition, there was some property besides that subject to the power. See *supra*. In *Jones v. Tucker*, *supra*, which goes nearest to the point, there were apparently arrears of rent due to the testatrix at the time of her death; and see *Humphery v. Humphery*, 36 L. T. 90.

On the other hand, a power vested in a married woman has been held to be executed by a general gift in her will when there was nothing else at her death upon which the gift could operate (see *post*), and there seems to be no apparent reason why married women should in this respect differ from other persons.

Chap. XIX.

Power vested
in married
woman.

With regard to realty, it is clear that where a married woman had a power to appoint realty, a general devise of her real and personal property passed the estate subject to the power, there being nothing else upon which the devise could operate. *Curteis v. Kenrick*, 3 M. & W. 461; 9 Sim. 443; *Churchill v. Dibbin*, 9 Sim. 447 *n*.

Where the property subject to the power was personalty, the cases go to this:

1. Where a married woman had a power of appointment, and no other property at the date of the will, but at her death there was some separate estate upon which the will could operate, a general gift did not execute the power. *Lovell v. Knight*, 2 Sim. 275, affirmed on appeal. *Lemprière v. Valpy*, 5 Sim. 108; *Evans v. Evans*, 23 B. 1.

2. But if at her death there was nothing upon which the will could take effect, the power was executed. *Shelford v. Acland*, 23 B. 10, where, however, the will was since the Wills Act. *A.-G. v. Wilkinson*, L. R. 2 Eq. 816; see *In re Herdman's Trust*, 31 L. R. Ir. 87.

B. General Powers after the Wills Act.

Sect. 27 of the Wills Act enacts that a general devise of the real estate of the testator, or of the real estate of the testator in any place or in the occupation of any person mentioned in his will or otherwise described in a general manner, shall be construed to include any real estate or any real estate to which such description shall extend (as the case may be) which he may have power to appoint, in any manner he may think proper, and shall operate as an execution of such power unless a contrary intention shall appear by the will. And in like manner a bequest of the personal estate of the testator or any bequest of personal property described in a general manner shall be con-

Effect of
sect. 27 of
the Wills Act
on general
powers.

Chap. XIX.

strued to include any personal estate, or any personal estate to which such description shall extend (as the case may be) which he may have power to appoint in any manner he may think proper, and shall operate as an execution of such power unless a contrary intention shall appear by the will.

The effect of the section is to put property over which the testator has a general power of appointment in the same position as his own property.

Testamentary power.

A power to appoint by will only is a general power within the section. *Re Powell's Trust*, 18 W. R. 228 ; 39 L. J. Ch. 188.

A power to appoint generally, with the exception of specified persons, is not a general power within the section. *In re Byron's Settlement* ; *Williams v. Mitchell*, (1891) 3 Ch. 474.

Such a power might be within the section if the excepted persons were dead when the power was exercised. *In re Byron's Settlement*, *supra*.

Power to appoint by will referring to power.

A power to appoint by will expressly referring to the power is not a general power within the section. *In re Phillips* ; *Robinson v. Burke*, 41 Ch. D. 417 ; *In re Tarrant's Trust*, 58 L. J. Ch. 780 ; *Phillips v. Cayley*, 43 Ch. D. 222 (overruling *In re Marsh* ; *Mason v. Thorne*, 38 Ch. D. 630) ; *In re Davies* ; *Davies v. Davies*, (1892) 3 Ch. 63.

A power to appoint "that any sum or sums of money not exceeding altogether the sum of 20,000*l.*, shall be raised and paid" is exercised by a general devise and bequest by virtue of this section. *In re Jones* ; *Greene v. Gordon*, 34 Ch. D. 65.

The fact that the power is contained in a settlement made by the testator before the date of his will raises no presumption that the will was not intended to execute the power. *In re Clark's Estate* ; *Maddick v. Marks*, 14 Ch. D. 422.

Contrary intention.

A contrary intention is not indicated by an express confirmation of the trusts of the instrument creating the power, where there is anything to which such confirmation can apply ; as, for instance, other settled property or prior trusts of the property over which the testator has the power, though the property may be disposed of in default of appointment. *Lake v. Currie*, 2 D. M. & G. 536 ; *Hutchin v. Osborne*, 4 K. & J. 252 ; 3 De G. & J. 142.

Nor by the fact that a life interest is given to a person when, Chap. XIX.
if that person survives the testator, the power will be gone.
Thomas v. Jones, 2 J. & H. 475; 1 D. J. & S. 63.

But it has been held that a gift of property "not otherwise disposed of" does not execute a power where the property subject to the power is disposed of in default of appointment.
Moss v. Harter, 3 Sm. & G. 458, *sed qu.*; see *Bush v. Cowan*, 9 Jur. N. S. 429; 11 W. R. 395.

The section applies as well to a general residuary bequest as to a gift of a general pecuniary legacy. *Spooner's Trust*, 2 Sim. N. S. 129; *Clifford v. Clifford*, 9 Ha. 675; *A.-G. v. Brackenbury*, 1 H. & C. 782; *Hawthorn v. Shedden*, 3 Sm. & G. 293; *Shelford v. Acland*, 23 B. 10; *Re Wilkinson*, 4 Ch. 587.

A direction to executors to pay the testator's debts out of his personal estate operates as an execution of a general power in favour of the executor. *Wilday v. Barnett*, 6 Eq. 193. Effect upon a general power of a direction to pay debts.

A simple direction to pay debts without the appointment of an executor would have the same effect. *Laing v. Cowan*, 24 B. 112.

But the mere appointment of an executor would probably not be enough. *Per Wickens, V.-C., In re Davies' Trusts*, 13 Eq. 166.

By the combined effects of sects. 24 and 27, a general power may be exercised by a general gift in a will made prior to the instrument creating the power, and it is now settled that a general devise or bequest executes a general power contained in a settlement subsequently made by the testator, though the will thereby makes the whole settlement nugatory. *Boyes v. Cook*, 14 Ch. D. 53; *Airey v. Bower*, 12 App. C. 263, overruling *In re Ruding's Settlement*, 14 Eq. 266; see, too, *In re Hernando*; *Hernando v. Sawtell*, 27 Ch. D. 284. Power exercised by will made previous to instrument creating power.

A subsequent power created by the testator will of course *à fortiori* be executed where the previous will expressly gives all property over which the testator has any power. *Patch v. Shore*, 2 Dr. & Sm. 589; *Re Old's Trusts*; *Pengelly v. Herbert*, 54 L. T. 677.

Or where the will expressly refers to the property, which is

Chap. XIX.

afterwards settled by the testator, who reserves to himself a power. *Stillman v. Weedon*, 16 Sim. 26; *Meredyth v. Meredyth*, 1 R. 5 Eq. 565; *Ccfield v. Pollard*, 3 Jur. N. S. 1203.

Contingent
power.

The same is the case where the power, though existing at the date of the will, is then only contingent, being given to the survivor of two persons of whom the testator is one. *Thomas v. Jones*, 2 J. & H. 475; 1 D. J. & S. 63. See p. 75, *ante*.

Where the settlor and testator were the same person and the power was to be executed by a last will, and the testator made a will before and another after the creation of the power, the latter purporting to be his last will, it was held that the first will was not meant to be an execution of the power. *Pettinger v. Ambler*, L. R. 1 Eq. 510.

Where the facts were first settlement, with power to appoint by deed or will, will purporting to execute only the power in this settlement, second settlement under the power in the first, and creating a power to appoint by will, the will was held not to execute the power in the second settlement. *Thompson v. Simpson*, 50 L. J. Ch. 461; see, however, *Airey v. Bower*, 12 App. C. 263.

Power
created by
third person.

It does not appear to have been decided that a mere general gift will execute a power subsequently given to the testator by third persons, though there can be no doubt that it would.

But a general gift will not execute a power given to the testator by the will of a person who survives him. *Jones v. Southall*, 32 B. 31.

Whether an
appointment
takes the fund
from the
donees in
default of
appointment
in all events.

An appointment to executors of a fund, over which the testator has a general power, takes the fund away from the donees in default of appointment, though some of the trusts declared by the testator may fail or trusts only exhausting part of the fund are declared. *Chamberlain v. Hutchinson*, 22 B. 444; *Keown's Estate*, 1 R. 1 Eq. 372; *Brickenden v. Williams*, 7 Eq. 310; *Wilkinson v. Schneider*, 9 Eq. 423; *Scriven v. Sandom*, 2 J. & H. 743; *In re Pinède's Settlement*, 12 Ch. D. 667; *In re Ickeringill's Estate*; *Hinsley v. Ickeringill*, 17 Ch. D. 151; *Blight v. Hartnoll*, 23 Ch. D. 218; see *Re Horton*; *Horton v. Perks*, 51 L. T. 420.

The rule applicable to personalty applies also to real estate, Chap. XIX.
 subject to a power, so that an appointment to trustees upon Real estate
subject to a
power.
 trust for a person, who predeceases the testator, takes the estate from the persons entitled in default of appointment. *In re Van Hagen*; *Sperling v. Rochfort*, 16 Ch. D. 18; *Willoughby Osborne v. Holyoake*, 22 Ch. D. 238.

The same doctrine has been applied where a general power was exercised by a marriage settlement. The settlor was held to have made the property subject to the power her own, so that upon failure of the ultimate trusts of the settlement there was a resulting trust for the settlor. *In re Scott*; *Scott v. Hanbury*, (1891) 1 Ch. 298. Power ex-
ercised by
deed.

The question whether the appointed fund is taken away from the persons entitled in default of appointment for all purposes, so that if the dispositions of the will fail the property goes to the heir-at-law or next-of-kin of the testator, is, however, one of intention, and if an intention can be gathered from the will to dispose of the fund for particular purposes only, the fund goes as in default of appointment if those purposes fail.

Thus a mere direction to pay debts takes the fund from the persons entitled in default of appointment only so far as it is required to pay the debts. *Laing v. Cowan*, 24 B. 112.

And where a testatrix by her will only exercised the power by appointing the property to her husband for life and then to her niece, and appointed an executor, but made no other disposition of her property, it was held that on the death of the niece before the testatrix the property went as in default of appointment. *In re Thurston*; *Thurston v. Evans*, 32 Ch. D. 508.

A distinction has been drawn between an appointment of the fund to a legatee direct and an appointment to trustees for the legatee. In the former case it has been held that the fund goes as in default of appointment if the legatee dies before the testator. *Re Davies' Trusts*, 13 Eq. 163; *In re De Lusi's Trusts*, 3 L. R. Ir. 232; see *Coxen v. Rowland*, (1894) 1 Ch. 406.

The fact that the testator distinguishes between the property subject to the power and his other property, and deals with each

Chap. XIX.

separately, has also been considered important as showing an intention not to make the appointed property part of the testator's assets for all purposes. *Easum v. Appleford*, 5 M. & Cr. 56; *In re De Lusi's Trusts*, 3 L. R. Ir. 232. See *Biddulph v. Williams*, 1 Ch. D. 203; *Coxen v. Rowland*, (1894) 1 Ch. 406.

Probably the distinctions which have been taken in some of the cases would not now be followed. See, too, *Bristow v. Skirrow*, 10 Eq. 1, which turned on the language of the power; *Hoare v. Osborne*, 12 W. R. 661; 33 L. J. Ch. 586; 10 Jur. N. S. 694, a case which has not been approved. See *In re Pinedi's Settlement Trusts*, 48 L. J. Ch. 741, 743, *per* Jessel, M.R.; *In re De Lusi's Trusts*, 3 L. R. Ir. 232, p. 240.

Administra-
tion of
appointed
fund.

Where a general power of appointment over a fund is executed by will, the executors of the will are the proper persons to administer and give a discharge for the fund. *In re Philbrick's Trusts*, 13 W. R. 570; 34 L. J. Ch. 368; *Hayes v. Oatley*, 14 Eq. 1; *In re Hoskin's Trusts*, 5 Ch. D. 229; 6 *ib.* 281.

It is however doubtful whether this rule applies in the case of a will of a married woman under a power, in cases not within the Married Woman's Property Act, 1882. See Davidson, *Precedents*, vol. iv., p. 585.

Power of
revocation
and new
appointment.

A general devise or bequest will not, under sect. 27, execute a power of revocation and new appointment. *Pomfret v. Perring*, 18 B. 618; 5 D. M. & G. 775; *Palmer v. Newell*, 20 B. 32; *Charles v. Burke*, 43 Ch. D. 223, n.; *In re Brace*; *Welch v. Colt*, (1891) 2 Ch. 671.

However, a general bequest by will has been held to exercise a general power, which had been previously exercised by a testamentary appointment not referred to in the will, and thereby to revoke the testamentary appointment. *In re Gibbes' Settlement*; *White v. Randolph*, 37 Ch. D. 143.

IV. QUESTION BETWEEN REAL AND PERSONAL RESIDUE.

Effect of
sale of land
subject to
general power.

Difficulties sometimes arise as to the effect of residuary gifts when a testator has a general testamentary power of disposition over settled land which is sold under powers in the settlement.

A general devise of lands, or of lands over which the testator has power to dispose, will not exercise a power of appointment over the proceeds of sale of lands settled on trust for sale. *Adams v. Austen*, 3 Russ. 461.

Where a testatrix had a general power of disposition by will over land, which was subject to a power of sale and reinvestment in land with her consent, and the land was sold and the proceeds paid to her, it was held that a general residuary bequest passed the proceeds of sale. *Chandler v. Pocock*, 15 Ch. D. 491; 16 Ch. D. 648; see *In re Harman*; *Lloyd v. Tardy*, (1894) 3 Ch. 607.

And where a testator has a general testamentary power over a settled estate, portions of which are sold with his consent under the usual powers, and there is no third person who can claim to have the proceeds invested in land, the proceeds of portions of the settled estate sold with the testator's consent pass under a general residuary bequest, and not under a residuary devise. *Gale v. Gale*, 21 B. 349; *Blake v. Blake*, 15 Ch. D. 481.

On the other hand, if there is a third person having an intermediate interest, who has an equity to have the proceeds of sale laid out in land, a general residuary gift will not pass the proceeds of sale. *Gillies v. Longlands*, 4 De G. & S. 379; *In re Greaves' Settlement*, 23 Ch. D. 313.

Money arising from the sale of land in Staffordshire held on trust for reinvestment in land in England, to which the testator was absolutely entitled in the event of his death without issue, which happened, was held to pass under a devise of his residuary real estate, and not under a devise of land in Staffordshire or under a gift of the residuary personalty. *In re Duke of Cleveland's Settled Estates*, (1893) 3 Ch. 244.

Where a testator has power to devise lands and also to appoint a sum charged upon the land, a general devise will not operate as an appointment of the sum so charged, which will pass under a general residuary bequest. *Farmer v. Bradford*, 3 Russ. 354; *Clifford v. Clifford*, 9 Ha. 675.

The rents of land which is devised contingently fall, until the contingency happens, into the real residue. *In re Freme*; *Freme v. Logan*, 65 L. T. 183; 60 L. J. Ch. 562.

CHAPTER XX.

EXECUTION OF SPECIAL POWERS.

Chap. XX.

Special
powers not
within s. 27.

SPECIAL powers are not within sect. 27 of the Wills Act. *Cloves v. Awdry*, 12 B. 604; *Russell v. Russell*, 12 Ir. Ch. 377; *Re Caplin's Will*, 2 Dr. & Sm. 527; *Humphery v. Humphery*, 36 L. T. 90; *Holyland v. Lewin*, 26 Ch. D. 266.

Nor within
s. 25 of
Wills Act.

Nor are they within sect. 25, so that where a testamentary appointment under a special power fails, a residuary gift will not by virtue of that section pass the property, the appointment whereof has failed. *Holyland v. Lewin*, 26 Ch. D. 266, overruling *Freme v. Clement*, 18 Ch. D. 499.

Since the Wills Act the fact that a person who purports to devise real estate has no real estate, but has a special power to appoint real estate, is not alone sufficient to show an intention to execute the power.

It is a question of construction upon the whole will, whether the special power was intended to be executed. *In re Mills*; *Mills v. Mills*, 34 Ch. D. 186; *In re Esther Williams*; *Foulkes v. Williams*, 42 Ch. D. 93; *Peirce v. McNeale*, (1894) 1 I. R. 118.

How special
power
executed.

In order to exercise a special power there must be a reference to the power or to the property subject to the power, or an intention otherwise expressed in the will to exercise the power. *Wildbore v. Gregory*, 12 Eq. 482; *Harvey v. Harvey*, 23 W. R. 478; *In re Herdman's Trusts*, 31 L. R. Ir. 87; *In re Huddleston*; *Bruno v. Eyston*, (1894) 3 Ch. 595.

What is a
sufficient
reference to
power.

1. What is a sufficient reference to a power.

A ratification of the trusts of the settlement creating a power is no evidence of an intention to execute the power. *Re Bingloe's Trust*, 26 L. T. 58.

A recital that a person is entitled to certain funds or to an estate, over which the testator has a power of appointment, will not amount to an execution of the power in favour of that person. *Pennefather v. Pennefather*, I. R. 7 Eq. 300; *L'Estrange v. L'Estrange*, 25 L. R. Ir. 399; see *Lees v. Lees*, I. R. 5 Eq. 549; *In re Walsh's Trusts*, 1 L. R. Ir. 320. Chap. XX.

A reference to a power as contained in a settlement of 1819, when the power was, in fact, contained in a resettlement of 1839, has been held a sufficient reference. *Re Wilmot*, 9 B. 644.

Words referring to a "beneficial power" do not *prima facie* mean a special power, though they may do so upon the language of a particular will. *Ames v. Cadogan*, 12 Ch. D. 868; *Von Brockdorff v. Malcolm*, 30 Ch. D. 172. Beneficial power.

Where a testator gives his own property and any property over which he has any disposing power, and he has only a special power of appointment, the latter words may be sufficient to include a special power. The intention must be gathered from the whole will. The cases do not lay down any general principles and are not easily reconcilable. Effect of gift of property over which testator has disposing power.

The simplest case is where the appointment is made to objects of the power, and is not in excess of the power. In such a case the power will be exercised. *Gainsford v. Dunn*, 17 Eq. 405; *In re Swinburne*; *Swinburne v. Pitt*, 27 Ch. D. 696. Gift not in excess of power.

The fact that the will, if treated as an execution of the power, gives a greater interest than the power authorises, for instance, an absolute interest instead of a life interest, is not necessarily conclusive against an exercise of the power. *In re Teape's Trusts*, 16 Eq. 442. Gift in excess of power.

Nor is the fact that a part of the property is given for purposes not authorised by the power or to persons who are not objects of the power. *Bailey v. Lloyd*, 5 Russ. 330; *Pidgely v. Pidgely*, 1 Coll. 255; *In re Swinburne*; *Swinburne v. Pitt*, 27 Ch. D. 696. Gift to persons not objects.

Nor the fact that the property is given as a residue or even that it is given upon trust to pay the testator's debts, as effect may be given to this trust by limiting it to the testator's own property. *Cowx v. Foster*, 1 J. & H. 30; *Ferries v. Jay*, Trust to pay debts.

Chap. XX. 10 Eq. 550; *In re Teape's Trusts*, 16 Eq. 442; *In re Swinburne*; *Swinburne v. Pitt*, 27 Ch. D. 676; see *In re Cotton*; *Wood v. Cotton*, 40 Ch. D. 41; *Clogstoun v. Walcott*, 13 Sim. 523, is not to be followed; see *In re Teape's Trusts*, *supra*.

But each of these circumstances affords an argument that the will was not intended to execute the power, and a combination of them may be sufficient to prevent the power from being exercised. See *Hope v. Hope*, 5 Giff. 13; *In re Cotton*; *Wood v. Cotton*, 40 Ch. D. 41.

A gift of "all my property whereof I have power to dispose" may also execute a special power if the circumstances or the language of the will are sufficient to indicate an intention to exercise the power. *Cooke v. Cunliffe*, 17 Q. B. 245; *Cowx v. Foster*, 1 J. & H. 30; *Thornton v. Thornton*, 20 Eq. 599; see *In re Richardson's Trusts*, 17 L. R. Ir. 436.

2. What is a sufficient reference to the property subject to the power.

There must be a reference to a specific fund.

There must be no doubt on the face of the will that the testator is referring to some specific fund in existence at the time of making the will.

Therefore, the fact that property of the same kind as that subject to the power is given merely in general terms—as, for instance, some particular kind of stock—will not execute the power, since the gift would be satisfied by purchasing the stock in question. *Webb v. Honnor*, 1 J. & W. 352; *Mattingley's Trusts*, 2 J. & H. 427; see *In re Wait*; *Workman v. Petgrave*, 30 Ch. D. 617.

Nor will the fact that legacies are given equal in amount to the fund subject to the power. *Jones v. Tucker*, 2 Mer. 533; *Davies v. Thorns*, 3 De G. & S. 347; *Forbes v. Ball*, 3 Mer. 437, is explained in *Davies v. Thorns*.

Nor that legacies are given largely in excess of the testator's estate, unless the property subject to the power is included in it. *Lowe v. Pennington*, 10 L. J. Ch. 83.

On the other hand where the testator uses words showing that he is disposing of a specific fund, the power will be executed. *Loundes v. Loundes*, 1 Y. & J. 445; *Innes v. Sayer*, 7 Ha. 381 3 Mac. & G. 607; *Rooke v. Rooke*, 2 Dr. & S. 38; *David's*

Trusts, Johns. 495; *Gratwick's Trusts*, L. R. 1 Eq. 177; **Chap. XX.**
Fletcher v. Fletcher, 7 L. R. Ir. 40.

And this is the case though some of the persons in whose favour the power is exercised are incapable of taking. *Gratwicke's Trusts*, *supra*; *Bruce v. Bruce*, 11 Eq. 371.

Where a specific fund is referred to, the fact that the fund subject to the power is misdescribed, or that the donee purports to appoint under a different power, makes no difference. *Muckinley v. Sison*, 8 Sim. 561; *Bruce v. Bruce*, 11 Eq. 371.

In the same way, where a portion of the property subject to the power is excepted out of a general gift, the rest of the property subject to the power passes. *Walter v. Mackie*, 4 Russ. 76; *Reid v. Reid*, 25 B. 469.

3. There is a third class of cases where a power is partially exercised either by a gift of some of the property subject to the power or by an express reference to the power, and there is then a general residuary gift. The question then arises whether the residuary gift executes the power so far as it remains unexecuted.

Whether
residuary gift
executes a
power already
partially
exercised.

A mere residuary gift without more would not have this effect *Hughes v. Turner*, 3 M. & K. 666; *Butler v. Gray*, 5 Ch. 26.

But if appointed parts of the fund are charged on the residue, or there is an intention expressed to appoint the whole fund, or there is evidence on the face of the will that the testator treats the fund subject to the power as his own, a residuary gift may execute the power so far as it remains unexecuted. *Elliott v. Elliott*, 15 Sim. 921; *Davies v. Fisher*, 5 B. 201; *Re Comber's Settlement*, 14 W. R. 172; *Harvey v. Stracey*, 1 Dr. 73.

And a gift of "the residue of my property and over which I have any power of disposal by will" may pass a share of a fund appointed by the will under a special power to a person not an object of the power. *In re Hunt's Trusts*, 31 Ch. D. 308.

Where there was a special power exercisable by the survivor of a husband and wife, after the death of the other of them, and the husband made a will in the lifetime of the wife containing words sufficient to refer to the special power, and after her death re-published the will by a codicil, the will was held to

Republication
of will.

Chap. XX.

Execution of
power of
revocation.

execute the power. *In re Blackburn*; *Smiles v. Blackburn*, 43 Ch. D. 75; see *Hope v. Hope*, 5 Giff. 13.

Where property is appointed under a power and a power of revocation is reserved, the power of revocation may be impliedly exercised if the will is expressed to be in exercise of the original power or appoints the property subject to the power. See *Quinn v. Armstrong*, 1 R. 11 Eq. 161.

But where a special power in a settlement has been partially exercised by a deed reserving a power of revocation, an appointment by will expressed to be made by virtue of the power in the settlement or otherwise howsoever, will not exercise the power of revocation, but will take effect only on the unappointed property. *Pomfret v. Perring*, 5 D. M. & G. 775.

And a will expressly exercising a special power, which is afterwards exercised by a deed reserving a power of revocation, will not operate upon so much of the property as is well appointed by the deed. *In re Wells' Trusts*; *Hardisty v. Wells*, 42 Ch. D. 646.

An appointment expressed to be under a particular power and all other powers enabling the testator, may take effect upon such interest as the testator has if the particular power does not in the events that have happened become exercisable. *Sing v. Leslie*, 2 H. & M. 68.

Whether fund
subject to
special power
can be ap-
pointed to
new trustees.

In the case of a special power over a fund vested in trustees it is not clear that the testator can without special authority appoint new trustees of the fund by his will. The fund should therefore be administered by the original trustees. *Busk v. Aldam*, 19 Eq. 16; *Von Brockdorff v. Malcolm*, 30 Ch. D. 172; see *Scotney v. Lomer*, 29 Ch. D. 535; 31 Ch. D. 380; *In re Cotton*; *Wood v. Cotton*, 40 Ch. D. 41; *In re Tyssen*; *Knight-Bruce v. Butterworth*, (1894) 1 Ch. 56.

CHAPTER XXI.

CONVERSION.

I. WHAT AMOUNTS TO A DIRECTION TO CONVERT.

PROPERTY directed to be converted is considered as that species of property into which it is to be converted, and passes to a legatee or devisee as if the conversion had actually taken place. Chap. XXI.
What amounts to a direction to convert.

A direction that land is to be considered as money or *vice versa* will not work a conversion, but an actual change of one form of property into another must be intended. *Johnson v. Arnold*, 1 Ves. Sen. 171; *A.-G. v. Mangles*, 5 M. & W. 120; *Edwards v. Tuck*, 23 B. 268; 3 D. M. & G. 40. Direction that land is to be considered money or money land.

A trust for sale which is void for remoteness does not effect a conversion. *Goodier v. Edmunds*, (1893) 3 Ch. 455.

A direction to divide does not imply a conversion. *Cornick v. Pearce*, 7 Ha. 477; *Lucas v. Brandreth*, 28 B. 273. Direction to divide.

But a direction to get together and divide among a large number of legatees property consisting of realty and personalty and previously described as scattered about and not realised, coupled with a direction to invest some of the shares, is in effect a direction to convert. *Mower v. Orr*, 7 Ha. 475.

A mere power to convert will not effect a conversion. *Greenway v. Greenway*, 2 D. F. & J. 128. Power to convert.

Though if legacies payable in the ordinary course are to be paid after the conversion, the power is in effect a trust. *Burrell v. Baskerfield*, 11 B. 525.

And what is in form a trust to convert may be controlled by the language of the will, so as to be in effect only a power. *In re Hotchkys*; *Freke v. Calmady*, 32 Ch. D. 408.

Chap. XXI.

Where a conversion is directed, the fact that the trustees have a discretion as to time will not alter the general rule. *Doughty v. Bull*, 2 P. W. 320; *In re Raw*; *Morris v. Griffiths*, 26 Ch. D. 60.

Conversion
upon request.

When conversion is to take place upon request the question is, whether the conversion was intended to be made in all events, and the request is only an additional safeguard, or whether no conversion was intended till request.

If the conversion is to be upon request of certain persons, and the property is disposed of, whether converted or not, there is no conversion till the request. *Taylor's Settlement*, 9 Ha. 596; *Davies v. Goodhew*, 6 Sim. 585.

On the other hand, if there is a general intention to convert evidenced by the fact that the limitations are applicable only to the property as converted, and by the fact that the conversion is to be at the request of certain persons or the survivor or the executors or administrators of the survivor, the property will be considered as converted. *Thornton v. Hawley*, 10 Ves. 129; see *Lechmere v. Earl of Carlisle*, 3 P. W. 211.

Absolute
discretion to
trustees.

Where trustees have an absolute discretion to convert or not, the property remains unconverted till the discretion is exercised. *Polley v. Seymour*, 2 Y. & C. Ex. 708; *Yates v. Yates*, 6 Jur. N. S. 1023; *Brown v. Bigg*, 7 Ves. 279; *Bourne v. Bourne*, 2 Ha. 35.

Similarly, where trustees have an option to convert either into realty or personalty, the property will be considered of that species into which the trustees convert it. *Van v. Barnett*, 19 Ves. 102; *Walker v. Denne*, 2 Ves. Jun. 170; *Rich v. Whitfield*, L. R. 2 Eq. 583.

Where there is a settlement of real estate with the usual power of sale, and trust for reinvestment in freeholds or leaseholds with power of interim investment in personalty, a sale and investment of the proceeds in personalty will not effect a conversion. *In re Bird*; *Pitman v. Pitman*, (1892) 2 Ch. 279.

Discretion
may be con-
trolled by the
context.

The option of the trustees may, however, be controlled by the general intention expressed in the will. Thus, if personalty is directed to be laid out in land or other security, and settled

in the same way as realty devised by the will, the general intention that the real and personal estate are to go together, may override the option. *Earlom v. Saunders*, Amb. 241; *Hereford v. Ravenhill*, 5 B. 51; see *Minors v. Battison*, 1 App. C. 428. Chap. XXI.

And in such a case an ultimate limitation to the testator's right heirs, executors, and administrators will not prevent the property being considered as land with respect to the prior interests. *Cowley v. Harstonge*, 1 Dow, 361.

But where the will disposes only of personalty, the fact that the limitations are appropriate only to realty will not control the trustees' option so as to convert the personalty. *Evans v. Ball*, 30 W. R. 899.

The fact that personalty which trustees have an option to convert is given to a person, his heirs and assigns, is not sufficient to limit the option of the trustees. *Atwell v. Atwell*, 13 Eq. 23.

But if it is given to a person and his heirs for ever, the property will apparently be considered converted notwithstanding the option of the trustees. *Cookson v. Reay*, 5 B. 22; see 12 Cl. & F. 121.

II. WHETHER CONVERSION IS DIRECTED FOR ALL THE PURPOSES OF THE WILL.

1. Where realty is directed to be converted and form part of the personal estate, it will be subject to all the limitations of the personal estate, and will pass by the residuary bequest. *Kidney v. Coussmaker*, 1 Ves. Jun. 436; *Robinson v. Governor of London Hospital*, 10 Ha. 19, 27; see *Bright v. Larcher*, 3 De G. & J. 148; *Field v. Peckett*, 29 B. 568; *quære*, whether *Collier v. Wakeman*, 2 Ves. Jun. 683, would be followed. Direction that converted realty should form part of the personal estate.

But notwithstanding a direction that moneys to arise from a sale of realty are to be considered as part of the personal estate, they will not pass under a gift of the residuary personalty, if the residuary gift is followed by a gift of the moneys arising from the sale. *Amphlett v. Parke*, 4 Russ. 75; 2 R. & M. 221.

Chap. XXI.

Gift of the residue of the proceeds of sale of realty under the old law.

2. It seems clear that under the old law a gift of the residue of the proceeds of sale of realty fell under the same rule as an ordinary residuary devise, and did not carry legacies given out of the proceeds, which failed through lapse or otherwise. *Jones v. Mitchell*, 1 S. & St. 290; *Hutcheson v. Hammond*, 3 B. C. C. 128.

Whether converted realty passes by a residuary bequest.

3. Upon the question whether conversion is directed for all the purposes of the will, so that interests in the proceeds of sale of realty which are undisposed of or fail by reason of lapse or otherwise, are intended to pass by a general bequest of residuary personalty, the cases run into fine, though, perhaps, not irreconcilable distinctions.

Direction to convert at a certain time and divide among persons who may not then be in existence.

a. When conversion is directed at the death of a tenant for life, and the proceeds are to be divided among a class of persons who at that time may not be in existence, or may never come into existence; for instance, such of the children of the tenant for life as attain twenty-one, conversion is not merely for the purpose of division, but for all the purposes of the will, and the property passes to the residuary legatee as personalty. *Wall v. Colshead*, 2 De G. & J. 683.

Absolute direction to sell.

b. Where there is an absolute direction to sell realty not limited to any particular purpose, the surplus proceeds will pass to the residuary legatee. *Singleton v. Tomlinson*, 3 App. C. 404, affirming S. C. nom. *Watson v. Arundell*, 1 R. 11 Eq. 53.

Sale for certain purposes.

c. If the realty is to be sold for a particular purpose, for instance, to pay legacies, the surplus proceeds will not pass under a gift of residuary personalty. *Maugham v. Mason*, 1 V. & B. 410.

Gift of a mixed fund to be converted.

d. Where realty and personalty are once for all blended together and directed to be converted, interests undisposed of will pass to the residuary legatee. *Durour v. Motteux*, 1 Ves. Sen. 320; 1 S. & St. 292 n.; *Byam v. Munton*, 1 R. & M. 503; *Green v. Jackson*, 5 Russ. 35; 2 R. & M. 238; *Salt v. Chattaway*, 3 B. 576; *Spencer v. Wilson*, 16 Eq. 501; *Court v. Buckland*, 45 L. J. Ch. 214; *Norreys v. Franks*, 1 R. 9 Eq. 18. *Cruse v. Barley*, 3 P. W. 20, may probably be accounted for on the principle that the gift of residue there was not of a real residue, but of the residue of a real residue. The residue had

in effect already been given among the testator's children, and the subsequent words only indicated what shares in that residue each was to take, and upon lapse of one of those shares a portion of the residue was thereby undisposed of. Chap. XXI.

e. But when the realty directed to be converted and the personalty are the subject of separate gifts, and are treated as distinct funds, the residuary bequest will not carry interests undisposed of in the realty. *Maugham v. Mason*, 1 V. & B. 410; *Hutcheson v. Hammond*, 3 B. C. C. 128. Realty directed to be converted the subject of a separate gift.

f. Intermediate between the last two classes of cases falls a class of cases where the real and personal estate are blended together, but the two funds are treated as distinct and independent, in which case the interests in the realty undisposed of will not pass to the residuary legatee. Realty and personalty blended but treated as distinct funds.

Thus, though realty and personalty are blended together and directed to be converted, if the proceeds of the sale of the realty are treated as a separate fund for certain payments, interests undisposed of will not pass under the gift of the residuary personalty. *Dixon v. Dawson*, 2 S. & St. 327.

So, too if there is a gift as well of the residue of the moneys to arise from the sale as of the residue of the personal estate, the latter residue will not carry legacies given out of the proceeds of sale which lapse. *Gravenor v. Hallum*, Amb. 643; *Gibbs v. Rumsey*, 2 V. & B. 294.

But the fact that the residue of the money to arise from the sale of realty is expressly given will not prevent such money from passing under the residuary personalty, if the residue of the money is only mentioned as part of the enumeration of the things of which the residuary personalty consists. *Kennell v. Abbott*, 4 Ves. 802.

III. CONVERSION IS LIMITED TO THE PURPOSES OF THE WILL.

Conversion directed by a testator is a conversion only for the purposes of the will, and all that is not wanted for these purposes goes to the persons who would have been entitled but for the will. Therefore, where real and personal estate is Who is entitled to property directed to be converted but undis-

Chap. XXI.

posed of by
l.

Declaration
that proceeds
of sale of
realty are to
be personal
estate.

directed to be sold, and after payment of debts and legacies the residue is given to persons, some of whom die before the testator, the lapsed shares go proportionally to the heir-at-law and next of kin. *Ackroyd v. Smithson*, 1 B. C. C. 503.

A declaration that the proceeds of the sale of realty are to be part of the personal estate for all purposes will not deprive the heir of such proportion of the proceeds of realty as is undisposed of, there being no express gift to the next of kin. *Shallcross v. Wright*, 12 B. 505; *Taylor v. Taylor*, 3 D. M. & G. 190; overruling *Phillips v. Phillips*, 1 M. & K. 649.

Nor will a declaration, that the proceeds of the sale shall not lapse for the benefit of the heir, exclude the heir, if a disposition is intended to be made of the property. *Flint v. Warren*, 16 Sim. 134; *Fitch v. Weber*, 6 Ha. 145.

But if the surplus of the sale of real estate is directed to be personal estate, and given to the executors, they take in trust for the next of kin. *Countess of Bristol v. Hungerford*, 2 Vern. 645, corrected 3 P. W. 194.

Money to be
invested in
land.

The same rule applies to the case of money to be invested in land, which, upon failure of the particular dispositions, or any of them, results so far for the next of kin. *Cogan v. Stevens*, 5 L. J. Ch. 17; 1 B. 482, n.; *Hereford v. Ravenhill*, 1 B. 481; 5 B. 51; *Head v. Godlee*, Johns. 536; *Earl of Bective v. Hodgson*, 10 H. L. 656.

IV. HOW THE HEIR AND NEXT OF KIN TAKE PROPERTY DIRECTED TO BE CONVERTED.

Where the
purpose of the
conversion
wholly fails.

1. When a conversion of realty is directed and the objects of the conversion wholly fail, the heir takes the property as realty, whether a sale has taken place or not. *Chitty v. Parker*, 2 Ves. Jun. 271; but *quære* whether the question arose in this case. *Davenport v. Coltman*, 12 Sim. 610.

Where it fails
partially.

2. But where some purpose of the will can be answered by a sale, where, for instance, there is a tenant for life or one of several tenants in common who survives the testator, the heir takes the property whether converted or not as personalty. *Wright v. Wright*, 16 Ves. 188; *Smith v. Claxton*, 4 Mad. 484;

Wilson v. Coles, 28 B. 215; *Hamilton v. Foote*, I. R. 6 Eq. 572; *In re Lewis*; *Foxwell v. Lewis*, 30 Ch. D. 654; *In re Richerson*; *Scales v. Heyhoe*, (1892) 1 Ch. 379. Chap. XXI.

Upon this principle, where a sum is directed to be raised out of devised lands and is given for life with remainders, and the remainders fail, upon the death of the tenant for life the sum charged belongs to the devisee of the land as personalty. *In re Newberry's Trusts*, 5 Ch. D. 746.

It would seem that where realty, directed to be converted, is only an auxiliary fund for payment of debts, and the personalty is sufficient to satisfy them, such realty will, on failure of all the other purposes, go to the heir as land. *Chitty v. Parker*, 2 Ves. Jun. 271.

But where realty and personalty are given together to be converted and charged with debts, so that the realty is applicable *pro ratâ*, the heir takes the realty as money on failure of all the other purposes of the conversion. *A.-G. v. Lomas*, L. R. 9 Ex. 29.

It has been said that the testator's death is the time at which it must be ascertained whether the purposes for which conversion is directed have failed or not, and therefore if at that time those purposes may possibly take effect, the heir takes as money, though they may subsequently fail. *Carr v. Collins*, 7 Jur. 165. The exact point, however, was not there decided, since, in that case, conversion was effectual with respect to the legacy of £1,000.

At what time it is to be ascertained whether the purposes have failed.

3. In the same way personalty laid out in land in pursuance of a direction in the will, but only partially disposed of, will go to the next of kin as land. *Cogan v. Stephens*, 5 L. J. Ch. 17; *Curteis v. Wormald*, 10 Ch. D. 172, overruling *Reynolds v. Godlee*, Johns. 536, 582; *In re Skerrett's Trusts*, 15 L. R. Ir. 1.

Money to be laid out in land goes to the next of kin as land.

V. CONVERSION BY EVENTS EXTRANEOUS TO THE WILL.

A binding contract for the sale of land belonging to the testator, though not completed at his death, converts the land, and the proceeds of sale fall into the personal residue. Contract for sale.

If the heir adopts and carries into effect a parol contract

Chap. XXI.

entered into by the testator, the land is converted, and the heir is not entitled to the purchase-money. *Frayne v. Taylor*, 12 W. R. 287; 33 L. J. Ch. 228; 10 Jur. N. S. 119.

If the testator's title turns out to be bad as to part of the property sold, and the contract is rescinded on this ground after his death, there is no conversion. *In re Thomas; Thomas v. Howell*, 34 Ch. D. 166; see *Crowe v. Menton*, 28 L. R. Ir. 519.

Contract enforceable against, not by, testator.

Upon the question whether there would be conversion where the contract could be enforced against, but not by, the testator, see *Lysaght v. Edwards*, 2 Ch. D. 499, 507; *Edwards v. West*, 7 Ch. D. 858, 862; *Crowe v. Menton*, 28 L. R. Ir. 519, 524.

Purchases under compulsory powers.

In the case of purchases of the testator's land under compulsory powers, a notice to treat under the Lands Clauses Act, followed by an agreement as to the price to be paid, converts the land, though there may be no sufficient memorandum in writing of the contract to satisfy the Statute of Frauds. *Ex parte Hawkins*, 13 Sim. 569; *Re Manchester and Southport Railway*, 19 B. 365; *Watts v. Watts*, 17 Eq. 217.

Notice to treat.

A mere notice to treat is not sufficient to effect a conversion, nor is a notice to treat followed by a statement on the part of the vendor of the sum he is willing to take, if he dies before his offer has been accepted. *Haynes v. Haynes*, 1 Dr. & Sm. 426; *Re Battersea Park Acts*; *Ex parte Arnold*, 32 B. 591; see *Coyne v. Coyne*, 1 R. 10 Eq. 496.

And an agreement, if land is taken under compulsory powers, to pay so much an acre for it, will not cause conversion. *Ex parte Walker*, 1 Dr. 508.

Exercise of option to purchase.

The doctrine of conversion by a contract for sale has been extended to cases of property devised subject to an option of purchase which is afterwards exercised.

Thus where land is devised which is subject to a lease with a power for the lessee to buy the land and the option of purchase is exercised by the lessee after the testator's death, the land is converted as from the date when the option is exercised and the proceeds of sale fall into the personal residue, though the land may be specifically devised. *Lawes v. Bennett*, 1 Cox, 167; *Townley v. Bedwell*, 14 Ves. 591; *Goold v. Teague*, 7 W. R.

84; 5 Jur. N. S. 116; *Collingwood v. Row*, 26 L. J. Ch. 649; Chap. XXI
In re Isaacs; *Isaacs v. Reginall*, (1894) 3 Ch. 506.

The case is the same whether the option to purchase is given before or after the date of the will, and if the option is created after the date of the will it makes no difference that the estate is devised by a specific description. *Weeding v. Weeding*, 1 J. & H. 424.

The rule applies though the purchase-money is payable to the testator, his heirs, or assigns. *Townley v. Bedwell*, 14 Ves. 591; *Weeding v. Weeding*, 1 J. & H. 424.

It is immaterial that the option does not arise until after the testator's death. *In re Isaacs*; *Isaacs v. Reginall*, *supra*.

In two cases, in one of which the option existed at the date of the will and in the other of which it existed at the date of a codicil confirming the will, it was held that as the land was devised by a specific description the devisee was entitled to the purchase-money upon the option being exercised. *Drant v. Vause*, 1 Y. & C. C. 580; *Emuss v. Smith*, 2 De G. & S. 722. It is impossible to say how far these cases will be followed, having regard to *Lawes v. Bennett*, and the other authorities already cited; see *In re Isaacs*; *Isaacs v. Reginall*, *supra*.

The doctrine of *Lawes v. Bennett*, has not, however, met with approval, and though it must be applied in similar cases, it is not to be extended. See *Edwards v. West*, 7 Ch. D. 858, p. 863; *In re Adams and Kensington Vestry*, 27 Ch. D. 394.

Thus where a rentcharge redeemable on payment of a lump sum was devised, it was held upon the language of the instrument giving the right to redeem that the devisee of the rentcharge was entitled to the redemption money. *In re Graves' Minors*, 15 Ir. Ch. 357; see *In re Crofton*, 1 Ir. Eq. 304.

Redemption
money for
rent-charge.

And where a lease determinable upon notice and payment of compensation was bequeathed, the legatee of the lease was held entitled to the compensation awarded. *Coyne v. Coyne*, 1 I. R. 10 Eq. 496.

In cases where conversion takes place the devisee is entitled Intermediate

Chap. XXI.
profits until
conversion.

to the rents between the testator's death and the completion of the purchase. *Watts v. Watts*, 17 Eq. 217.

If the conversion is brought about by the exercise of an option to purchase, the devisee takes the rents and profits until the option is exercised. *Townley v. Bedwell*, 14 Ves. 591.

Interest on
purchase-
money.

Interest payable by the purchaser on his purchase-money does not go to the devisee, but forms part of the personal estate. *Townley v. Bedwell*, 14 Ves. 591; *Puxley v. Puxley*, 1 N. R. 509.

Contract to
purchase
realty.

Since the Act 40 & 41 Vict. c. 34, which applies to testators dying after the 31st December, 1877, if a testator contracts to buy realty and dies before the purchase is completed and the vendor has a lien for the purchase-money, it seems that the purchase-money as between persons entitled to the real and personal estate is to be borne by the realty purchased. *In re Cockcroft*; *Broadbent v. Groves*, 24 Ch. D. 94.

In cases not within that Act, if there is a contract to purchase realty, which is binding on the testator at his death, the purchase-money is converted into realty, and the heir or devisee is entitled to it, though the vendor may retain a power of rescission which is actually exercised after the testator's death. *Whittaker v. Whittaker*, 4 B. C. C. 30; *Garnett v. Acton*, 28 B. 333; *Hudson v. Cook*, 13 Eq. 417.

If the contract goes off owing to a defect in the title, there is no conversion, and a devisee has no right to waive the want of title, and call upon the executor to complete. *Broome v. Monck*, 10 Ves. 597.

Contract to
build a house.

If the testator has contracted with a builder for the building of a house on a piece of land devised by him, the devisee is entitled to have the contract performed out of the personal estate, whether the Court would decree specific performance of the contract or not. *Cooper v. Jarman*, 3 Eq. 98; see *Re Tann*, 7 Eq. 434.

Conversion
under statu-
tory powers.

Upon the same principles where certain property is after the date of the will converted into personalty by Act of Parliament, the property passes as personalty, though the conveyances required by the Act may not have been executed. *Cadman v. Cadman*, 13 Eq. 470; see *Frewin v. Frewin*, 10 Ch. 610.

In the same way where realty has been rightfully converted, whether by a trustee in bankruptcy or under an order of the Court, it passes as personalty, and in the latter case the conversion is held to take place as from the date of the decree. *Banks v. Scott*, 5 Mad. 493; *Steed v. Preece*, 18 Eq. 192; *Arnold v. Dixon*, 19 Eq. 113; *Hyett v. Mekin*, 25 Ch. D. 735.

Chap. XXI.
Conversion by trustee in bankruptcy or by order of Court.

Where more than was necessary has been sold under a decree, for instance for payment of a mortgage debt, the surplus proceeds of sale retain their former character. *Cooke v. Dealey*, 22 B. 196; *Jermyn v. Preston*, 13 Sim. 356; *Scott v. Scott*, 9 L. R. Ir. 367; but see *Steed v. Preece*, *supra*.

A sale by order of the Court for the convenience of the parties and not for the purposes of the suit, converts the property out and out. *Ferguson v. Benyon*, 17 L. R. Ir. 212.

Sale by order of Court.

As to the effect of taking the lands of a lunatic under the Lands Clauses Act, under a notice to the lunatic and not to the committee, see *Ex parte Flamank*, 1 Sim. N. S. 260; *In re Tugwell*, 27 Ch. D. 309.

Land of lunatic.

Money of a lunatic laid out under an order in lunacy in the purchase of land, with a declaration that the land is to be considered personal estate, remains personal estate of the lunatic. *A.-G. v. Marquis of Ailesbury*, 12 App. C. 672.

Money of lunatic invested in land.

As to the effect of the conversion of renewable leaseholds for lives and years held in *quasi* tail into a fee under statutory powers, see *Morris v. Morris*, I. R. 6 C. L. 73; *ib.* 7, p. 295; *In re Dane's Estate*, I. R. 10 Eq. 207; *Batteste v. Maunsell*, I. R. 10 Eq. 314.

Conversion into fee simple of renewable leaseholds held in *quasi* tail.

CHAPTER XXII.

GIFTS TO PERSONÆ DESIGNATÆ AND TO PERSONS
FILLING A CERTAIN CHARACTER.

A. GIFTS TO PERSONÆ DESIGNATÆ.

Chap. XXII.

What
evidence is
admissible.

I. FOR the purpose of ascertaining the persons to take under certain names and descriptions, evidence is admissible : ' firstly of all the facts known to the testator at the time of making his will ; secondly, of any peculiar names or phrases which the testator was in the habit of using, whether nicknames or names erroneously applied to certain objects, provided in the latter case there are no persons to whom the names correctly apply, and for this purpose any documents or writings of the testator, including a prior will, are admissible. *Reynolds v. Whitan*, 16 L. J. Ch. 434 ; see *Feltham's Trusts*, 1 K. & J. 532 ; *Gregory's Will*, 34 B. 600.

Evidence is also admissible of the objects the testator was likely to benefit : evidence, for instance, to which of two societies, both insufficiently answering a certain description, the testator was in the habit of subscribing. *Kilvert's Trusts*, 12 Eq. 183 ; 7 Ch. 170.

Person fully
answering
the descrip-
tion will take
as *persona*
designata.

If among the objects thus shown to be known to the testator there is some one who fully answers the description in the will, evidence to show that another person was meant is not admissible. *Delmare v. Robello*, 1 Ves. Jun. 412 ; 3 B. C. C. 446 ; *Holmes v. Custance*, 12 Ves. 279 ; *In bonis Peel*, 2 P. & D. 46.

A legatee is sufficiently described by his first Christian name, or even by initials. *Mostyn v. Mostyn*, 5 H. L. 155 ; *Abbot v. Massie*, 3 Ves. 148.

It is, on the other hand, perfectly clear that the mere fact of a person fully answering to the description in the will (the description being of a *persona designata*) will not entitle him to take under it if it appears from the admissible evidence that the testator was not aware of his existence. Therefore, under a gift to Elizabeth, daughter of Mary Beynon, or to my nephew Joseph, neither Elizabeth, an illegitimate daughter, nor a nephew called Joseph, will take if it appears that the testator was not aware of their existence. *Doe d. Thomas v. Beynon*, 12 Ad. & E. 431; *Grant v. Grant*, L. R. 5 C. P. 380, 727.

Chap. XXII.

But not if he was unknown to the testator.

The testator may have habitually called certain persons or things by peculiar names by which they are not commonly known, and of this evidence is admissible; thus, where the gift was to Catherine Earnley, evidence was admitted to show whom the testator was in the habit of calling by that name. *Beaumont v. Fell*, 2 P. W. 141; *Masters v. Masters*, 1 P. W. 421; *Dowset v. Sweet*, Amb. 175; *Lee v. Pain*, 4 Ha. 251; *Kell v. Charmer*, 23 B. 195.

Evidence of nickname, &c., is admissible.

But if the testator merely designates legatees by letters having no reference to their names, there is a patent ambiguity which may not be explained by evidence. *Clayton v. Nugent*, 13 M. & W. 200; *Sullivan v. Sullivan*, I. R. 4 Eq. 457.

But not evidence to explain a patent ambiguity.

Where a blank is left for the name of a legatee, no evidence of intention is admissible, and the gift is void for uncertainty. *Winn v. Littleton*, 2 Ch. Ca. 51; *Baylis v. Attorney-General*, 2 Atk. 239; *Hunt v. Hort*, 3 B. C. C. 311; *Taylor v. Richardson*, 2 Dr. 16.

Blanks may not be supplied.

Where, however, there is a clear gift to a certain class, and an intention is expressed of including or excluding certain persons whose names are left in blank, the clause of inclusion or exclusion only is void for uncertainty, and the gift to the class is good. *Illingworth v. Cooke*, 9 Ha. 37; *Gill v. Bagshaw*, L. R. 2 Eq. 746.

But if the testator goes on to define the class by name, and inserts the names of persons who cannot alone be said to constitute the class, leaving blanks for other names, the gift is void for uncertainty; for instance, if the gift be to my nephews and nieces, John and Nanny, followed by a blank, John and Nanny

Chap. XXII. not satisfying the description nephews and nieces. *Greig v. Martin*, 5 Jur. N. S. 329.

The fact that a blank is left for the Christian name, or for the surname, of the legatee will not avoid the legacy if there is no doubt to whom the rest of the name applies. *Price v. Page*, 4 Ves. 680; *Phillips v. Barker*, 1 Sm. & G. 582, where the gift was to — Davis, daughter of S. Davis, and the testator knew only of one daughter at the date of the will. *In bonis De Rosaz*, 2 P. D. 66; see *Re Gregson's Trusts*, 12 W. R. 935.

Although a blank is left for the name of a legatee, the Court may be able from the context to ascertain who was intended to take. *In re Harrison*; *Turner v. Hellard*, 30 Ch. D. 390; *Furniss v. Phear*, 36 W. R. 521.

Inaccurate
description.

II. Where the legatee is inaccurately named or described, so that there is no one who fully answers the name or description, the Court will if possible gather from the contents of the will and the surrounding circumstances who was meant. *Ryall v. Hannam*, 10 B. 536; *Camoy's v. Blundell*, 11 Sim. 467; 1 Ph. 279; 1 H. L. 778; *Stringer v. Gardiner*, 27 B. 35; 4 De G. & J. 468; *Douglas v. Fellows*, Kay, 114; *Dooley v. Mahon*, 1 I. R. 11 Eq. 299; *In re Twohill*, 3 L. R. Ir. 21; *Patching v. Barnett*, 28 W. R. 886; *In bonis Brake*, 6 P. D. 217; *Baxter v. Morgan*, 7 L. R. Ir. 501; *In re Taylor*; *Cloak v. Hammond*, 34 Ch. Div. 255; *In bonis John Chappell*, (1894) P. 98.

In determining whether a legatee fully answers the description, the whole will must be considered. Thus though there may be a person precisely answering to the name given by the testator, it may appear from other parts of the will that that person could not have been intended. *Charter v. Charter*, L. R. 2 P. & D. 315; *ib.* 7 H. L. 364; *In re Wolverton Mortgaged Estates*, 7 Ch. D. 197.

The fact that a legatee has once been accurately described will not prevent his taking another gift under a less full or an inaccurate description. *Doe d. Morgan v. Morgan*, 1 Cr. & M. 235; *Careless v. Careless*, 19 Ves. 604; 1 Mer. 384.

But it will if the two descriptions are so different as to raise a strong probability that the same legatee cannot have been meant. *Lee v. Pain*, 4 Ha. 254.

If a legatee is mentioned by name and an erroneous description is added, the name will prevail if there is a person fully answering to the name and no one to answer the description. *Veritas nominis tollit errorem demonstrationis*. *Standen v. Standen*, 2 Ves. Jun. 589; 6 B. P. C. 193; *Doe d. Gains v. Rouse*, 5 C.B. 442; *Re Blackman*, 16 B. 377; *Re Ingle's Trusts*, 11 Eq. 578.

Chap. XXII.

Name
accurate,
superadded
description
inaccurate.

Similarly, if there is no one to answer the name, a person satisfying the description will take. *Pitcairne v. Brase*, Finch, 403; *Dowset v. Sweet*, Amb. 175; *Parsons v. Parsons*, 1 Ves. Jun. 266; *Garth v. Meyrick*, 1 B. C. C. 30; *Doe d. Cook v. Danvers*, 7 East, 229.

Name
inaccurate,
superadded
description
accurate.

III. If there are several persons who accurately answer the whole description, there is an equivocation, and evidence of the testator's intention is admissible. *Lord Cheney's Case*, 3 Rep. p. 137; fol. 68a.; *Doe d. Morgan v. Morgan*, 1 Cr. & M. 235; *Doe d. Gord v. Needs*, 2 M. & W. 129; *Doe d. Allen v. Allen*, 12 A. & E. 451; *Jones v. Newman*, 1 W. Bl. 60; *Jefferies v. Michell*, 20 B. 15; *In bonis Ashton*, (1892) P. 83; *Phelan v. Slattery*, 19 L. R. Ir. 177.

Equivocation.

And if part of the description applies equally to two persons and the rest of it applies to no one, the portion which has no application may be considered away, so as to raise an equivocation and make evidence of intention admissible. *Price v. Page*, 4 Ves. 680; *Still v. Hoste*, 6 Mad. 192; *Careless v. Careless*, 19 Ves. 604; 1 Mer. 384. These cases are referred to this head by Lord Abinger, C.B., in *Doe d. Hiscocks v. Hiscocks*, 5 M. & W. 363, 370; but *quære* whether *Price v. Page* was not a case of equivocation strictly, and whether the latter two cases were not mere cases of misdescription. At any rate, in them no evidence of intention proper was offered, but only evidence of surrounding circumstances.

To raise a case of equivocation it is sufficient, if two persons equally answer the description in a popular sense.

Equivocation
may arise
though two
persons may
not both
answer the
same descrip-
tion with
equal
accuracy.

Thus a father and son both equally answer the description John Smith, though properly speaking the son is John Smith the younger. *Jones v. Newman*, 1 W. Bl. 60.

So a person whose name was W. M. and one whose name was

Chap. XXII. W. J. R. B. M. were both held equally to answer the description W. M., since a man is popularly known by his first Christian name. *Bennett v. Marshall*, 2 K. & J. 740.

The will may on the face of it raise a case of equivocation.

It makes no difference that the will itself shows that there are two persons equally answering a given description. For instance, if there is a gift to G. G., son of J. G., another to G. G., son of G. G., and a third to G. G., son of G. *Doe d. Gord v. Needs*, 2 M. & W. 129.

But parol evidence is not admissible to show to which of two antecedents in the will a word of reference is to be referred, if, for instance, two Ann Collins's have been mentioned, and there is a gift to the said Ann Collins. *Fox v. Collins*, 2 Ed. 107; *Castledon v. Turner*, 3 Atk. 257.

An apparent case of equivocation may be explained by the will itself.

No case of equivocation arises if it can be gathered from the will which of several persons equally answering the name is meant, as in a devise to M. W., my brother, and to Simon, my brother's son—the son of the brother just mentioned being clearly indicated. *Doe d. Westlake v. Westlake*, 4 B. & Ald. 57; *Healy v. Healy*, 1 R. 9 Eq. 418.

And, similarly, if a legatee has once been accurately described, and the same name is afterwards mentioned without the description, evidence is not admissible to show that a different legatee of that name was meant. *Webber v. Corbett*, 16 Eq. 515; *Richardson v. Watson*, 4 B. & Ad. 787.

But the case is different if there is first a gift to A. B. and then a gift to A. B. of X., and there are two A. B.'s, one of X. and one not. *Doe d. Morgan v. Morgan*, 1 Cr. & M. 235.

Whether nephews proper and a wife's nephews are both equally nephews.

Further, it is clear that if there were a gift to my "nephews" as a class, evidence that the testator generally applied the term to his wife's nephews would not raise a case of equivocation so as to make evidence of intention admissible as between nephews proper and wife's nephews. *Beachcroft v. Beachcroft*, 1 Mad. 430, which may be cited to the contrary, so far as it cannot be upheld *ex visceribus* of the will, has been generally disapproved.

It is equally clear that if the testator at the date of his will had only a wife's nephew called Joseph, the subsequent birth of a brother's son called Joseph would not entitle the latter to

take under a gift to my nephew Joseph. And the result would be the same if the testator at the date of his will was not aware that his brother had a son called Joseph. *Doe d. Thomas v. Beynon*, 12 Ad. & E. 431; *Grant v. Grant*, L. R. 5 C. P. 380, *ib.* 727. My nephew Joseph is clearly *persona designata*, and the question then is, whom did the testator mean to point out?

Evidence of intention, though in fact admitted in *Grant v. Grant*, was not necessary for the decision, since the testator cannot have meant to benefit a person of whose existence he was not aware, under a particular name and description, and therefore a case of equivocation cannot be said there to have arisen.

Whether evidence of intention would be admissible if the testator was aware at the date of his will that both his brother and his brother-in-law had sons called Joseph is doubtful, though the judgment in *Grant v. Grant* seems to imply that it would.

IV. If there is a gift by name, with a particular description superadded, and there is some one who answers to the name and some one who answers to the description, no evidence of intention is admissible. *Doe d. Hiscocks v. Hiscocks*, 5 M. & W. 363; *Bernasconi v. Atkinson*, 10 Ha. 345; *Charter v. Charter*, L. R. 2 P. & D. 315; *ib.* 7 H. L. 364; see *In bonis John Chappell*, (1894) P. 98.

Case where part of a description applies to one person and part to another.

In some cases, if there is nothing to point out one person more than the other, the gift will be void for uncertainty. *Thomas v. Thomas*, 6 T. R. 671; *Drake v. Drake*, 8 H. L. 172. See *Cope v. Henshaw*, 35 B. 420; *Re Ely*; *Tottenham v. Ely*, 65 L. T. 452.

In such cases the rule that the name is to prevail against an error of demonstration can only apply if it is clear that the error is in the demonstration. And therefore either the name or the description will prevail, according as it is reasonably certain that the mistake is more likely to be made in the name than in the description, or *vice versa*.

If the gift is to A. B., second son of C. D., and A. B. is the third son, and there is nothing either in the will or in the relations of the second and third sons to the testator to point

Gift to A., second son of B., where A. is the third son of B.

Chap. XXII.

out one more than the other, the name will prevail. *Doe d. Chevalier v. Huthwaite*, 8 Taunt. 306 ; 2 Moo. 304 ; see 3 B. & Ald. 632 ; *Pryce v. Newbolt*, 14 Sim. 354 ; *Garland v. Beverley*, 9 Ch. D. 213 ; *In re Lyon's Trusts*, 48 L. J. Ch. 245 ; see, too, *Farrer v. St. Catherine's Coll.*, 16 Eq. 19.

But it may appear from the will or the relations of the second and third son to the testator, or from the fact that one of the sons was otherwise provided for, whether the name or description was erroneous. Thus, if one of the two was godson or well known to the testator, the other not, the former takes. *Bernasconi v. Atkinson*, 10 Ha. 345 ; *Gregory's Will*, 34 B. 601 ; *Hodgson v. Clarke*, 1 D. F. & J. 394.

So if the testator, after a limitation to A. B., the second son of C., limits remainders to the third and fourth sons and so on, the argument is strong that the description and not the name was to prevail. *Bradshaw v. Bradshaw*, 2 Y. & C. Ex. 72 ; *Neeld v. Neeld*, W. N. 1878, 219.

But this argument was held not to apply where the limitations were to R. G. fourth son of G. G. in fee in case he should attain twenty-one, but if he should die under that age to the fifth son in fee, and so on ; and accordingly R. H. G., the third son, took. *Gillett v. Gane*, 10 Eq. 29.

Where the description is careful and elaborate it prevails.

If, on the other hand, the description is such as to particularise a certain person, and to leave no doubt as to which of two persons was meant, the description will prevail. *Smith v. Coney*, 6 Ves. 42 ; *Lee v. Pain*, 4 Ha. 253 ; *Adams v. Jones*, 9 Ha. 485 ; *Charter v. Charter*, L. R. 2 P. & D. 315 ; *ib.* 7 H. L. 364.

And though there may be a person answering to the name, if there are in the will expressions which show that he could not have been meant, the case falls under the same head, and it becomes a question whether the name or the description is to prevail. *Charter v. Charter*, L. R. 2 P. & D. 315 ; *ib.* 7 H. L. 364.

Where the description supplies a motive for the gift.

If the description is such as itself to supply a motive for the gift, the description will prevail. *Nunn's Trusts*, 19 Eq. 331 ; see *Re Fry*, 22 W. R. 679, 813 ; *Re Blayney's Trust*, I. R. 9 Eq. 413.

B. GIFTS TO PERSONS FILLING A CERTAIN CHARACTER.

Under a gift to Lord S. as an heirloom, the person who was Lord S. at the date of the will was held to be meant. *In re Whorwood*; *Ogle v. Lord Sherborne*, 34 Ch. D. 446.

Gift to Lord S.

The mere fact that a gift is made to a named legatee in a certain character, as for instance to my wife A., does not avoid the legacy if the legatee does not happen to fill the character. *Schloss v. Stiebel*, 6 Sim. 1; *Giles v. Giles*, 1 Kee. 685; *Re Pitt's Will*, 27 B. 576; *In re Boddington*; *Boddington v. Clairat*, 22 Ch. D. 597; 25 Ch. D. 685.

Gift to a legatee in a certain character.

Where the testator was separated from his wife, and had gone through the ceremony of marriage with another woman, the latter took under a residuary gift "to my wife." *In bonis Howe*, 33 W. R. 48.

If the legatee fraudulently assumed the character of wife for the purpose of deceiving the testator, and procuring a legacy, the question of fraud must be raised in the Court of Probate. A Court of Construction has no jurisdiction to go into the question of fraud where the will has once been proved. *Meluish v. Milton*, 3 Ch. D. 27, overruling *Kennell v. Abbott*, 4 Ves. 802; *Wilkinson v. Joughin*, L. R. 2 Eq. 319; see *Rishton v. Cobb*, 5 M. & Cr. 145; *In re Boddington*; *Boddington v. Clairat*, 25 Ch. D. 685; and see *ante*, pp. 23, 72.

A gift to servants or employes has been held, upon the context of the will in each case, to refer to servants in the testator's employment at the date of his will (a), at his death (b), and both at the date of the will and death (c). *Parker v. Marchant*, 1 Y. & C. C. 290 (a); *In re Marcus*; *Marcus v. Marcus*, 56 L. J. Ch. 830; 57 L. T. 399 (b); *Jones v. Henley*, 2 Ch. Rep. 162 (c).

Servants and employes.

The word servants is not necessarily confined to servants living in the house. It has been held to include a farm-bailiff, a gardener and under-gardener, and a house-steward. *Bulling v. Ellice*, 9 Jur. 936; *Thrupp v. Collett*, 26 B. 147; *Armstrong v. Clavering*, 27 B. 226.

Such persons as stewards of Courts, a coachman provided by a job master, or a boy occasionally employed, are not included

Chap. XXII.

under the term servants. *Townshend v. Windham*, 2 Vern. 546; *Chilcott v. Bromley*, 12 Ves. 114; *Thrupp v. Collett*, 26 B. 147.

Domestic servants.

The term domestic or household servants excludes out-door servants. *Ogle v. Morgan*, 1 D. M. & G. 359; *Re Drax*; *Savile v. Yeatman*, 57 L. T. 475.

Gift of a year's wages.

If the gift is of a year's wages it will be limited to servants hired by the year. *Booth v. Dean*, 1 M. & K. 560; *Blackwell v. Pennant*, 9 Ha. 551; *Breslin v. Waldron*, 4 Ir. Ch. 384.

A bequest to the two servants who shall be living with me at my death, has been held to go to all living with the testator at his death, though there may have been only two at the date of the will. *Sleech v. Thorington*, 2 Ves. Sen. 560.

Under a bequest to servants "living with me at my decease," servants who have been wrongfully discharged before the testator's death, or voluntarily leaving the service, or dismissed on account of the testator's lunacy, are not entitled to anything. *Darlow v. Edwards*, 1 H. & C. 547; *Re Serres' Estate*; *Venes v. Marriott*, 10 W. R. 751; 31 L. J. Ch. 519; *In re Hartley's Trusts*, 26 W. R. 590; see *In re Benyon*; *Benyon v. Grieve*, 32 W. R. 871.

But a servant who at the testator's death has temporarily left his house and is to return to service is entitled to the legacy. *Herbert v. Reid*, 16 Ves. 481.

Gift to the testator's wife.

In wills under the Wills Act a gift to the testator's wife must mean the person calling herself his wife at the date of the will, as a second marriage operates as a revocation of the will, and therefore a deceased wife's sister may take under the description of the testator's wife. *Pratt v. Matthew*, 22 B. 328; *Pitt's Will*, 27 B. 576; 5 Jur. N. S. 1235.

But *prima facie* wife means lawful wife. *Davenport's Trusts*, 1 Sm. & G. 126.

A gift to "my wife A." is effectual though the wife may after the date of the will have procured a divorce on the ground of nullity. *In re Boddington*; *Boddington v. Clairat*, 22 Ch. D. 597; 25 Ch. D. 685.

But in the same case a gift to the wife "so long as she shall continue my widow" was held not to take effect, as the legatee

never having been the testator's wife could not continue his widow. Chap. XXII.

But where a testator spoke of A.'s mistress as his wife, a gift to her "if she shall become A.'s widow" was held to take effect on her surviving A. *In re J. Lowe*; *Danily v. Platt*, 61 L. J. Ch. 415; 40 W. R. 475.

Prima facie a gift to the wife of A. who has a wife living at the date of the will goes to that wife and no other. *Boreham v. Bignall*, 8 Ha. 131; *Burrow's Trusts*, 10 L. T. N. S. 184. Gift to the wife of a third person.

At any rate this is the case if there is anything to show that the testator referred to a person known to him, by adding, for instance, the epithet "beloved." *Niblock v. Garrett*, 1 R. & M. 629.

And when a daughter has been described as wife of A., a subsequent gift to her husband means that husband only. *Bryan's Trust*, 2 Sim. N. S. 103; *Franks v. Brooker*, 27 B. 635.

But a gift, after a life interest to a son, amongst the wife of the son (in case she should survive him) and all and every the children of the son, has been held to include a second wife, though there was a wife living at the date of the will, as it would include children by a second marriage. *In re Lyne's Trust*, 8 Eq. 65; but see *Firth v. Fielden*, 22 W. R. 622.

And a direction that in case of the bankruptcy of any of the legatees for life, their shares should be applied for the benefit of the wife and children of such legatees during the remainder of the life of the legatee, will include a second wife of one of the legatees who was married at the date of the will; the direction being applicable to several legatees, some of whom were not married, showing that no particular wife was intended. *Longworth v. Bellamy*, 40 L. J. Ch. 513.

But a similar direction as to the share of one legatee who was married at the date of the will will not include a second wife. *Boreham v. Bignall*, 8 Ha. 131.

Where there is a gift to a son or daughter for life with remainder to any wife or husband of the son or daughter for life, a divorced wife or husband would probably not take. The cases are however conflicting. *Bullmore v. Wynter*, 22 Ch. D. 619; *In re Morrieson*; *Hitchins v. Morrieson*, 40 Ch. D. 30. Divorced wife or husband.

Chap. XXII.

Gift to the
wife of a
person who
is unmarried.

If there is no person answering the description at the date of the will or the death, the gift vests indefeasibly in the first person who answers the description. *Radford v. Willis*, 12 Eq. 105; 7 Ch. 7; see *Peppin v. Beckford*, 3 Ves. 570.

As to the effect of a divorce upon a gift to a husband and wife during their joint lives, see *Knox v. Wells*, 2 H. & M. 674.

Gifts to
husband and
wife and third
person.

The construction of a gift to a husband and wife and a third person by a will made after the commencement of the Married Women's Property Act, 1882 (1st January, 1883), is not affected by the Act. *In re March*; *Mander v. Harris*, 24 Ch. D. 222; 27 Ch. D. 166; *In re Jupp*; *Jupp v. Buckwell*, 39 Ch. D. 148; see *Thornley v. Thornley*, (1893) 2 Ch. 229.

"If an estate be made of land to a husband and wife, and to a third person, in this case the husband and wife have in law in their right but the moiety." *Littleton*, sect. 291. The same rule applies to personalty, and it makes no difference whether the bequest is a joint tenancy or a tenancy in common.

Thus a bequest to A. and B. his wife and C. as tenants in common goes in moieties to A. and his wife and to C. *In re Wylde's Estate*, 2 D. M. & G. 724; *In re Jupp*; *Jupp v. Buckwell*, 39 Ch. D. 148.

A bequest to A. and B. his wife and C. during their lives and the life of the survivor of them, and after the death of the survivor over, would be enough to show that the wife was to take a separate interest. *Marchant v. Cragg*, 31 B. 398.

If the bequest is to A., B. and C. and the wife of C. equally, the second "and" is looked upon as a *subcopula*, and the property goes in thirds. *Bricker v. Whatley*, 1 Vern. 233.

So, too, if the gift is to A., his wife and children, the husband and wife take one share. *Gordon v. Whieldon*, 11 B. 170; *Atcheson v. Atcheson*, *ib.* 485.

But a very slight evidence of intention that the wife is to take a separate share has been held sufficient to prevent the rule; thus, if the words are to A., B., C., and his wife as tenants in common, husband and wife take several shares. *Warrington v. Warrington*, 2 Ha. 54; *In re Dixon*; *Byram v. Tull*, 42 Ch. D. 306, where the earlier cases are discussed; see, too *Paine v. Wagner*, 12 Sim. 184.

And apparently if the words are to my son-in-law B. and my daughter P. his wife, their executors, administrators, and assigns, both take equally—the gift not being to husband and wife, but to son-in-law and daughter. *A.-G. v. Bacchus*, 9 Pr. 30; 11 Pr. 547. Chap. XXII.

Possibly the rule of the unity of husband and wife would not be applied to a husband and wife living under a foreign law, which recognises the separate existence of the wife. *Dias v. De Livera*, 5 App. C. 123.

Where a husband and wife are members of a class to which property is given, each takes a share. *In re Gue; Smith v. Gue*, 61 L. J. Ch. 510; 40 W. R. 553.

Whether a gift to unmarried children is *designatio personarum* or not depends on the language of the will. Thus, a gift to the son and unmarried daughters of A. goes to the daughters unmarried at the date of the will, the gift to the son showing that particular persons are meant. *Hall v. Robertson*, 4 D. M. & G. 781; see *Elliott v. Elliott*, 11 Ir. Ch. 482. Meaning of the word unmarried in a direct gift.

Where the gift designates a class ascertainable at the testator's death, the subsequent marriage of one of the class will not avoid the gift. *Jubber v. Jubber*, 9 Sim. 503; see *Blagrove v. Coore*, 27 B. 138.

The primary meaning of unmarried in a direct gift is never having been married. *Thistlethwayte's Trusts*, 1 Jur. N. S. 881; 24 L. J. Ch. 713; *Dalrymple v. Hall*, 16 Ch. D. 715; *In re Sergeant; Mertens v. Walley*, 26 Ch. D. 575.

Under a gift to A. B., if she be sole and unmarried, the legatee, whose marriage has been dissolved by the Divorce Court, was held entitled. *In re Lesingham's Trusts*, 24 Ch. D. 703.

And under a gift after the death of the husband to the wife so long as she continues unmarried, the wife is entitled though she has been divorced. *Knox v. Wells*, 31 W. R. 559; 48 L. T. 655.

A gift to "a son" of a person will, it seems, go to the son living at the date of the gift, if there is one. *Powell v. Davies*, 1 B. 532. Gift to "a son."

If there is no son living it goes to the first son born afterwards, if he survives the testator. *Powell v. Davies*, 1 B. 532; *Ash-*

Chap. XXII. *burner v. Wilson*, 17 Sim. 204; see, too, *Russell v. Russell*, 12 Ir. Ch. 377.

Gift to one
of a class is
void.

A gift to one of a class, as to one of the sons of a person, is void, though only one member of the class may happen to be living at the death of the testator. *Strode v. Russell*, 2 Vern. 621, 624; *In bonis Baylis*, 2 Sw. & T. 613; *In bonis Blackwell*, 2 P. D. 72; see *Beauchant v. Usticke*, W. N. 1880, 14; *Smithwick v. Hayden*, 19 L. R. Ir. 490.

But a gift to one of a class who does a particular act within a given time will be good, if it can be construed as a gift to that member of the class who first does the Act. *Bate v. Amherst*, Ca. t. T. Raymond, 82, where the gift was to one of my cousin's daughters that shall marry a Norton within fifteen years.

Gifts to a first
or second son.

The natural meaning of first or second son is first or second in order of birth.

1. No difficulty arises where all the sons born are living at the testator's death, or where no sons have then been born. In the latter case, the first or second son born afterwards will take. See *Driver v. Frank*, 3 Mau. & S. 25; 8 Taunt. 468; *Alexander v. Alexander*, 16 C. B. 59; *Bennett v. Bennett*, 2 Dr. & Sm. 266.

The second born son will take as second son, though his elder brother may die before he is born. *Trafford v. Ashton*, 2 Vern. 660.

2. If there is a first son at the date of the will it seems probable that he would take as *persona designata*. *Saunders v. Richardson*, 18 Jur. 714; see *Re Harris*, 2 W. R. 689.

So, too, if there were a first and second son living at the date of the will the second son would probably take under the description second son. Whether the second son at the date of the will whose elder brother had died would take as second son, *quære*.

3. If a first or second son is dead at the date of the will the term will mean first or second son at the testator's death. *King v. Bennett*, 4 M. & W. 36; *Thompson v. Thompson*, 1 Coll. 388,—where the provisions of the will were confirmed by a codicil after the death of the first born son.

4. If a first or second son is born after the date of the will

and dies in the testator's lifetime, a first or second surviving son will take. *Lomax v. Holmden*, 1 Ves. Sen. 290. Chap. XXII.

But this is not the case if the testator contemplates the possibility of lapse and provides for it: for instance, by a gift to the seventh or youngest child of a person who at the date of the will had six children. *West v. Lord Primate of Ireland*, 2 Cox, 258; 3 B. C. C. 148.

The terms elder and younger in wills must *primâ facie* be considered as used in their strict sense as applicable to age, and not in the figurative sense of anterior and posterior in order of limitation of estates. *Scarisbrick v. Lord Skelmersdale*, 4 Y. & C. Ex. 78; 2 H. L. 167; *Lyddon v. Ellison*, 19 B. 565; *Livesey v. Livesey*, 2 H. L. 419; *Longfield v. Bantry*, 15 L. R. Ir. 101. Meaning of the terms elder and younger.

In the case of limitations of real estate devised for life with remainders in tail, the natural meaning of eldest son is first born son. *Bathurst v. Errington*, 2 App. C. 698, 709.

Therefore, under a devise to the eldest son of A. for life with remainder to his first and other sons successively in tail, with remainder to the second and other sons of A. successively in tail, if the first born son of A. dies in the testator's lifetime without issue, A.'s second son takes an estate tail. *Meredith v. Treffry*, 12 Ch. D. 170.

The term eldest son may mean only son, as youngest child may mean only child. *Tuite v. Bermingham*, L. R. 7 H. L. 634; *Emery v. England*, 3 Ves. 232.

If the testator contemplates a younger son as becoming eldest, or if the eldest were dead at the date of the will, eldest son can, of course, not mean first born son. *Hervey-Bathurst v. Stanley*, 4 Ch. D. 251; S. C. sub nom. *Bathurst v. Errington*, 2 App. C. 698.

A clause shifting estates in the event of a younger son becoming the eldest son of his father applies only to a son becoming the eldest in his father's lifetime. *Bathurst v. Errington*, 2 App. C. 698.

When a testator has made a disposition in favour of his sons, arranging them in a descending order of birth with a gift over of their respective shares in certain events to "my next surviving Next surviving son.

Chap. XXII. son," the next younger son takes under this description. *Eastwood v. Lockwood*, L. R. 3 Eq. 487.

In the case of a bequest of personalty, whether immediate or in remainder, to the eldest child of a person, the eldest child living at the testator's death will take, though he may not have been the eldest at the date of the will. *Re Harris' Trust*, 2 W. R. 689; see *In re Whorwood*, 34 Ch. D. 446.

The class of younger children is to be ascertained at the period of vesting.

With regard to the period at which the class of younger children is to be ascertained—

If there is an immediate gift to younger children the class will be ascertained at the testator's death, and a child who after that time becomes eldest will not be excluded. *Coleman v. Seymour*, 1 Ves. Sen. 209; *Umbers v. Jaggard*, 9 Eq. 201.

Similarly, if the gift is to the younger children who attain twenty-one, a child who is a younger child when it attains twenty-one will take, though it may afterwards become eldest. *Adams v. Roberts*, 25 B. 658. The decision in *Matthews v. Paul*, 3 Sw. 328, may be supported on the ground that the son excluded was the eldest at the time of vesting as well as at the time of distribution. See *Domville v. Winnington*, 26 Ch. D. 382.

In the same way an eldest son to be excluded will be ascertained at the time of vesting and not at the time of distribution. *Sandeman v. Mackenzie*, 1 J. & H. 613; *Adams v. Bush*, 8 Sc. 405; 6 Bing. N. C. 164; *Theed's Settlement*, 3 K. & J. 375; *Adams v. Adams*, 25 B. 642; *Domville v. Winnington*, 26 Ch. D. 382.

Contrary intention.

The testator may, however, show that the persons filling the character of eldest or youngest children were to be ascertained at the time of distribution by contemplating, for instance, the possibility that several persons successively might become eldest sons after the time of vesting. *Bowles v. Bowles*, 10 Ves. 177; *Livesey v. Livesey*, 2 H. L. 419; *Madden v. Ikin*, 2 Dr. & S. 207.

Gift to a class of younger children upon a contingency.

Where the gift is to younger children upon some contingency, the cases are conflicting.

If there are no children surviving when the contingency happens the gift goes to the representatives of those who died

in the lifetime of an elder brother. *Lady Lincoln v. Pelham*, Chap. XXII. 10 Ves. 166.

If there are children living when the contingency happens, *Ellison v. Airey*, 1 Ves. Sen. 111, and *Hall v. Hewer*, Amb. 204, are direct authorities for saying that the eldest child is to be then ascertained, and not before. See, too, *Stevens v. Pile*, 30 B. 284.

But now it would probably be held that the class ought to be ascertained at the time when the interests become transmissible, and it was so decided in *Bryan v. Collins*, 16 B. 14. See, too, *Sanders' Trust*, L. R. 1 Eq. 675.

The exclusion from a class of a child "entitled" to certain property means *primâ facie* entitled in possession. *Chorley v. Loveland*, 33 B. 189; 12 W. R. 187; *Umbers v. Jaggard*, 9 Eq. 201. Meaning of "entitled."

See further as to the construction of similar clauses of exclusion, *Wyndham v. Fane*, 11 Ha. 287; *Johnson v. Foulds*, 5 Eq. 268; *Re Gryll's Trust*, 6 Eq. 589.

When the testator has placed himself *in loco parentis*, and shows an intention to provide portions for younger children, the rule established with regard to marriage settlements, that elder son means a son taking the bulk of the estate, and younger son a son unprovided for, applies to wills, as well in the case of personalty as of realty. *Bayley's Settlement*, 9 Eq. 491; 6 Ch. 590. In what cases eldest son means a son taking the bulk of the estates.

In such cases the rule is that where the bulk of an estate is settled in strict settlement, and by the same settlement portions are provided for younger children, no child taking the bulk of the estate by virtue of the limitations in strict settlement, shall take any benefit from the portions. *Macoubrey v. Jones*, 2 K. & J. 684, 690.

Even in marriage settlements, however, this construction will not be adopted, unless it appears upon the face of the instrument that the exclusion had reference to the fact of the person to be excluded taking other property. *Re Theed's Settlement*, 3 K. & J. 375; *Hervey-Bathurst v. Stanley*, 4 Ch. D. 251, 262; see *Domville v. Winnington*, 26 Ch. D. 382.

The time for ascertaining who fills the character of eldest son

Chap. XXII. is the period for distributing the portions, but he need not then be entitled to the settled estate if he has substantially had the benefit of it. *Collingwood v. Stanhope*, L. R. 4 H. L. 43; see *In re Fitzgerald's Settled Estates*; *Saunders v. Boyd*, (1891) 3 Ch. 394.

Younger son may mean son not taking the family estate.

And a younger son who at that time has become the eldest and takes the estate will be excluded from a portion, though the portion may have already vested in him. *Gray v. Earl of Limerick*, 2 De G. & S. 370; *Richards v. Richards*, Johns. 754; *Davies v. Huguenin*, 1 H. & M. 730; *Swinburne v. Swinburne*, 17 W. R. 47; see *Leake v. Leake*, 10 Ves. 476.

If, however, the eldest son is excluded not as eldest son, but by name, the rule does not apply. *Wood v. Wood*, 4 Eq. 48.

And if the testator specifically mentions those whom he includes in the class of younger children, the rule does not apply. *In re Prytherch*; *Prytherch v. Williams*, 42 Ch. D. 590.

In what cases the eldest son is to be ascertained at the period of vesting.

There may, however, be circumstances showing that the eldest son is to be ascertained at some other time than the period of distribution; for instance, at the time of vesting.

A mere gift over to take effect on a younger son becoming an eldest before attaining twenty-one will not alter the rule. *Bayley's Settlement*, 9 Eq. 491; 6 Ch. 590.

But if there is a clear intention that the portions are to vest indefeasibly before the time of distribution, the eldest son is ascertained at the time of vesting. *Windham v. Graham*, 1 Russ. 331; see *Ex parte Smyth*, 12 Ir. Ch. 487; *Re Rivers' Settlement*, 40 L. J. Ch. 87.

Under what title a son must take the family estates in order to be excluded from a portion.

The further question arises in what manner the younger child must be entitled to the estate in order to be excluded from a portion.

The fact that the estate has been sold for a sum not sufficient to satisfy the portions does not entitle the eldest son to a portion. *Reid v. Hoare*, 26 Ch. D. 363.

A second son, becoming an eldest son, but prevented from taking the estate by a recovery suffered in the lifetime of his brother, is entitled to share in portions provided by the settlement for younger children. *Tennison v. Moore*, 13 Ir. Eq. 424; *Spencer v. Spencer*, 8 Sim. 87; *Macoubrey v. Jones*, 2 K. & J.

684; *Adams v. Beck*, 25 B. 648, overruling *Peacocke v. Pares*, Chap. XXII.
2 Kee. 689.

So, too, a younger son succeeding to the reversion of the settled estates, not under the settlement creating the portions, but by descent or by devise, is not within the rule, and does not lose his right to a portion. *Sing v. Leslie*, 2 H. & M. 68; *Adams v. Beck*, 25 B. 648.

On the other hand, as a younger child becoming elder is excluded from taking a portion, so an elder child not taking the estate is admitted to a portion. *Duke v. Doidge*, 2 Ves. Sen. 203.

An elder son not taking the estate may be entitled to a portion.

And if he dies before the period of distribution his representatives are entitled, whether the exclusion is of the eldest son for the time being or not. *Ellison v. Thomas*, 2 Dr. & Sm. 111; 1 D. J. & S. 18; *Davies v. Huguenin*, 1 H. & M. 730; *Swinburne v. Swinburne*, 17 W. R. 47.

An elder son has been included under the expression second and other sons, in cases where the probability was that the elder had been left out by mistake. *Langston v. Langston*, 8 Bl. N. S. 16; 2 Cl. & F. 194; *Blake's Estate*, 19 W. R. 765; *Tavernor v. Grindley*, 32 L. T. N. S. 424; *Grattan v. Langdale*, 11 L. R. Ir. 473.

Gift to second and other sons has in some cases included a first son.

But this construction will not be adopted when there are sufficient reasons for the exclusion of the elder son. *Bermingham v. Tuite*, 1 R. 7 Eq. 221; L. R. 7 H. L. 634; *Locke v. Dunlop*, 39 Ch. D. 387.

CHAPTER XXIII.

CONSTRUCTION OF GIFTS TO CHILDREN.

A. ILLEGITIMATE CHILDREN.

Chap. XXIII.

Children
means legiti-
mate children.

I. "THE description child, son, issue, every word of that species, must be taken *prima facie* to mean legitimate child, son, or issue:" *per* Lord Eldon, *Wilkinson v. Adam*, 1 V. & B. 422. And it may be stated as a general rule that where there is a bequest to children without anything on the face of the will to show that the testator meant by children illegitimate children, and there is a possibility at the date of the will of legitimate children to satisfy the terms of the bequest, evidence *dehors* the will is not admitted to prove that the testator may or must have meant illegitimate children. *Durrant v. Friend*, 5 De G. & S. 343; *Re Davenport's Trusts*, 1 Sm. & G. 126; *Re Overhill's Trusts*, 1 Sm. & G. 362; *Medworth v. Pope*, 27 B. 71; *Warner v. Warner*, 15 Jur. 141; 20 L. J. Ch. 273; and see *Gabb v. Prendergast*, 1 K. & J. 439; *Godfrey v. Davis*, 6 Ves. 43; *Kenebel v. Scrafton*, 2 East, 530; *Harris v. Lloyd*, T. & R. 310; *Mortimer v. West*, 3 Russ. 370; *Bagley v. Mollard*, 1 R. & M. 581; *Swaine v. Kennerley*, 1 V. & B. 469; *Meredith v. Farr*, 2 Y. & C. C. 525; *Re Bolton*; *Brown v. Bolton*, 31 Ch. D. 542; *In re Fish*; *Ingham v. Rayner*, (1894) 2 Ch. 83.

The same rule applies where the words next of kin are used. *Re Standley's Estate*, L. R. 2 Eq. 303.

In the will of a Jew domiciled in England, children must mean legitimate children according to English and not according to Jewish law. *Levy v. Solomon*, 25 W. R. 842.

Legitimacy

The term children in a gift by will of personalty (a), or land

devised upon trust for sale (b), or realty (c), to the children of a person domiciled abroad, includes children who are legitimate according to the law of their parents' domicile. *In re Andros*; *Andros v. Andros*, 24 Ch. D. 637 (a); *Skottowe v. Young*, 11 Eq. 474 (b); *In re Grey's Trusts*; *Grey v. Stamford*, (1892) 3 Ch. 88 (c). *In re Wright's Trusts*, 2 K. & J. 595; *Boyes v. Bedale*, 1 H. & M. 798, so far as *contra* are overruled. See, too, *In re Wilson's Trusts*, L. R. 1 Eq. 247; *ib.* 3 H. L. 55; *Atkinson v. Anderson*, 21 Ch. D. 100.

Chap. XXIII.
determined by
domicile.

As regards succession *ab intestato* a different rule applies to realty and to personalty. A person can only claim as heir by descent who is legitimate by English law. *Doe v. Vardill*, 2 Cl. & F. 571; 7 Cl. & F. 895; 6 Bing. N. C. 385; 9 Bl. N. R. 32. But next of kin of an intestate will include persons who are legitimate by the law of their parents' domicile. *In re Goodman's Trusts*, 14 Ch. D. 619; 17 Ch. D. 266.

Succession
ab intestato.

In order that a child may be legitimated by the subsequent marriage of its parents, the father must be domiciled, both at the child's birth and at the marriage, in a country which allows of such legitimation. *In re Grove*; *Vaucher v. Solicitor to the Treasury*, 40 Ch. D. 216.

II. But under the description of child, son, issue, and similar words, illegitimate children if they have acquired the reputation of being children of the person in question may take in the following cases:

In what cases
illegitimate
children may
take.

1. If looking at the circumstances existing at the date of the will there is no possibility of legitimate children to satisfy the terms of the bequest.

When there
is no possi-
bility of
legitimate
children.

(a.) If, for instance, the bequest is to the children of A. now living, and A. has only illegitimate children, they would take. *Dover v. Alexander*, 2 Hare, 282, *per* Wigram, V.-C.

(b.) So if it appears from the language of the will that children living at the date of the will are meant, and there are only illegitimate children then living, they will take. *In re Haseldine*; *Grange v. Sturdy*, 31 Ch. D. 511.

Thus in *Holt v. Sindrey*, 7 Eq. 170, there was a bequest to the testator's "daughter Mary, the wife of John Lattimer," and after her death "unto all and every the child or children of his

Chap. XXIII said daughter begotten or to be begotten." It appeared that Mary was not the lawful wife of John Lattimer, and that the testator was not aware of this fact. Stuart, V.-C. held that illegitimate children born at the date of the will were sufficiently described by the words "children begotten." See, too, *In re Dixon*, 2 Jur. N. S. 970; *Gabb v. Prendergast*, 1 K. & J. 439.

And in *Savage v. Robertson*, 7 Eq. 176, a bequest to "my sister, Mary Robertson, and her two youngest daughters," Mary Robertson being a spinster, was held a sufficient designation of her two youngest illegitimate daughters. See *Hartley v. Tribber*, 16 B. 510; *Laker v. Hordern*, 1 Ch. D. 644.

A direction, however, to divide property into shares corresponding in number with the number of legitimate and illegitimate children of a person at the date of the will, is not in itself a sufficient indication that illegitimate children then living are meant to be included, since, if before the testator's death one or more of the children had died, the division prescribed by the will would have been inapplicable. *Cartwright v. Vaudry*, 5 Ves. 530; *In re Wells' Estate*, 6 Eq. 599.

(c.) If the gift is to the children of a deceased person who had only illegitimate children, the illegitimate children take. *Lord Woodhouselee v. Dalrymple*, 2 Mer. 419; *Edmunds v. Fessey*, 29 B. 233.

(d.) If the gift is to the children in the plural of a deceased person who had only one legitimate child and one or more illegitimate children, they will all take in order to satisfy the plural number. *Gill v. Shelley*, 2 R. & M. 336; *Leigh v. Byron*, 1 Sm. & G. 486; *In re Humphries*; *Smith v. Milledge*, 24 Ch. D. 691; but see *Hart v. Durand*, 3 Anstr. 684.

If, however, it does not appear on the face of the will that the person to whose children the bequest is given was dead at the date of the will, and the testator was not a near relation, it will not be presumed that he knew of the death, but evidence will be admitted to show that he was aware of it. See *Herbert's Trusts*, 1 J. & H. 121; *Milne v. Wood*, 42 L. J. Ch. 545.

(e.) The description "children" will also be taken to mean illegitimate children when the gift is to the children of two

persons who cannot by any possibility have legitimate children Chap. XXIII.
between them. *Bayley v. Snelham*, 1 S. & St. 78.

(f.) The fact that an unmarried man makes a bequest to his children is not alone sufficient to include illegitimate children, though as a will is revoked by marriage none but illegitimate children could by any possibility take under it. *Pratt v. Matthew*, 22 B. 328; *In re Bolton*; *Brown v. Bolton*, 31 Ch. D. 542; see *Clifton v. Goodbun*, 6 Eq. 278.

Under a gift to the children of a living person, when there is no evidence on the face of the will to show that illegitimate children are intended, legitimate children alone will take. And this will be the case—

Circumstances
insufficient
to admit
illegitimate
children.

Though the person whose children are to be benefited has, at the date of the will, only illegitimate children, and at the testator's death there is no possibility of any others. *Godfrey v. Davis*, 6 Ves. 43; *Re Davenport's Trusts*, 1 Sm. & G. 126; *Kelly v. Hammond*, 26 B. 36; *Dorin v. Dorin*, L. R. 7 H. L. 568.

It will also be the case, though the person to whose children a gift is bequeathed has, at the date of the will, only illegitimate children, and is, whether from old age or other causes, never likely to have any others. *Re Overhill's Trust*, 1 Sm. & G. 362; *Paul v. Children*, 12 Eq. 16; *Re Browne*; *Raggett v. Browne*, 61 L. T. 463; *Re Brown*; *Penrose v. Manning*, 63 L. T. 159. *Fraser v. Piggott*, You. 354, before Lord Lyndhurst; and *Beachcroft v. Beachcroft*, 1 Mad. 430, before Sir Thomas Plumer, M.R., so far as they decide the contrary must be taken as overruled; see *James v. Smith*, 14 Sim. 216; *Re Overhill's Trust*, 1 Sm. & G. 362; *Holt v. Sindrey*, 7 Eq. 170.

2. Illegitimate children existing at the date of the will, including a child then *en ventre*, may take under the term children if they are sufficiently indicated, that is to say, where "taking the will as the dictionary of the meaning of the terms used in it," it appears that the testator meant illegitimate children. *Wilkinson v. Adam*, 1 V. & B. 422, p. 462; *Hill v. Crook*, L. R. 6 H. L. 265. "The intention need not be expressed in language which is necessarily susceptible of only one interpretation, but it is sufficient if it is indicated in a way that

The testator
may show
that he meant
illegitimate
children.

Chap. XXIII excludes the probability of an opposite intention having existed in the mind of the testator." *Hill v. Crook*, L. R. 6 H. L. 277, *per* Lord Chelmsford.

(a.) Thus natural children, born at the date of the will, of course take where the gift is to natural children in express terms. *Metham v. Duke of Devon*, 1 P. W. 529; *Barnett v. Tugwell*, 31 B. 232; *Evans v. Massey*, 8 P. 22; *Bentley v. Blizzard*, 4 Jur. N. S. 652.

(b.) So if after a gift to the children of A., the testator in a subsequent gift defines whom he means, by adding "namely," and inserting their names. *Meredith v. Farr*, 2 Y. & C. C. 525.

(c.) Or if the testator excepts from a gift to the children of A. a child who is illegitimate. *In re Lowe*; *Danily v. Platt*, 61 L. J. Ch. 415; 40 W. R. 475.

(d.) If there is a gift to the children of the testator by a particular woman, when it appears on the face of the will that he has a wife living, or to "my wife A. for life, and after her death to my children," where the testator is not married to A., but has a wife living from whom he is separated, his children by A. will take. *Wilkinson v. Adam*, 1 V. & B. 422; *Lepine v. Bean*, 10 Eq. 160. See *Bayley v. Snelham*, 1 S. & St. 78.

Gift to A.,
wife of B.,
and then to
her children.

(e.) A convenient rule of construction may be deduced from the judgments of the House of Lords, in *Hill v. Crook*, L. R. 6 H. L. 265, to the effect that where a testator describes A. as the wife of B. when he knows that A. is not in fact lawfully married to B., and by that description gives property to her for life with remainder to her children, the term children must be taken to include A.'s children by B. See *per* Earl Cairns, L. R. 6 H. L. p. 285.

This rule was approved and followed in *In re Horner*; *Eagleton v. Horner*, 37 Ch. D. 695; *In re Harrison*; *Harrison v. Higson*, (1894) 1 Ch. 561.

The rule has been held not to apply if there is nothing to show that the testator knew that there was no lawful marriage. *In re Ayles' Trusts*, 1 Ch. D. 282, as explained in *In re Horner*; *Eagleton v. Horner*, 37 Ch. D. 695; *In re Bolton*; *Brown v. Bolton*, 31 Ch. D. 542. See *In re Yearwood's Trusts*, 5 Ch. D. 545; *Ellis v. Houston*, 10 Ch. D. 236.

(f.) Under a gift to the children of the testator's daughter by her present putative husband or by any other person whom she might marry, though the daughter subsequently married her then putative husband, her illegitimate son by him took. *In re Brown's Trust*, 16 Eq. 239; *In re Connor*, 2 J. & Lat. 456; *Dilley v. Matthews*, 13 W. R. 676; 11 Jur. N. S. 425. Chap. XXIII.

(g.) Where a testator has described a person who is illegitimate by a term applicable in strictness to legitimate relationship only, the question often arises whether such a person is included under the same term when used in another part of the will or under another term also applicable in strictness only to legitimate relationship. Illegitimate child called a child.

The cases run into fine distinctions and depend upon their own peculiar circumstances. The following is a summary of the points which have arisen:—

If the testator applies the expression child to an illegitimate child, that child may take under a general gift to children.

The intention to include the illegitimate child may be shewn by a recital that the testator has a certain number of children which can only be satisfied by including an illegitimate child, or by any other evidence of intention to include an illegitimate child in the class children, or by the testator merely applying the term child to the illegitimate child. *Owen v. Bryant*, 2 D. M. & G. 697; *Worts v. Cubitt*, 19 B. 421; *Evans v. Davies*, 7 Ha. 498; *Smith v. Jobson*, 59 L. T. 397; *In re Bryon*; *Drummond v. Leigh*, 30 Ch. D. 110; *In re Jodrell*; *Jodrell v. Seale*, 44 Ch. D. 590; *S. C. sub nom. Seale-Hayne v. Jodrell*, (1891) A. C. 304; *Re Brown*; *Walsh v. Browne*, 62 L. T. 899.

Where a special provision is made for an illegitimate child, who is described as a child of a particular person and there is a subsequent gift to the children of that person, the illegitimate child has been held not to be included in the subsequent gift to children. In such a case there is an intention to deal with the illegitimate child separately from the others. *Bagley v. Mollard*, 1 R. & M. 581; *Megson v. Hindle*, 15 Ch. D. 198. Special provision for bastard.

The mere description of an illegitimate child as the testator's nephew has been held insufficient to include him in a subsequent

Chap. XXIII. gift to children of his sister. It will be noticed that in this case the word defined by the testator was nephew and not child. *In re Hall*; *Branston v. Weightman*, 35 Ch. D. 551.

Gifts over. (h.) Where a testator devised real estate to an illegitimate daughter, whom he described as his eldest daughter, and the will contained a gift over under certain circumstances of the share, whether land or money, of any of the testator's children, it was held that the gift over applied to the real estate devised to the illegitimate daughter. *Smith v. Jobson*, 59 L. T. 397; see *Allen v. Webster*, 6 Jur. N. S. 574.

Whether legitimate and illegitimate children can take together under one description.

III. It has sometimes been laid down that legitimate and illegitimate children cannot together take under the same description or the same class. For instance, in *Bagley v. Mollard*, 1 R. & M. 581, Leach, M. R., said, "Whenever the general description of children will include legitimate children it cannot also be extended to illegitimate children," p. 586. See, too, *per* Lord Romilly, M. R., in *Pratt v. Matthew*, 22 B. 328. "It is also clear that illegitimate children cannot take under a gift to children unless it be quite clear on the face of the gift that legitimate children never could have taken under the gift." As early an authority, however, as *Wilkinson v. Adam*, 1 V. & B. 422, seems to point the other way (see especially the opinion of the judges there stated), though the exact point was not decided, but there is no doubt now since the case of *Hill v. Crook*, L. R. 6 H. L. 265, that a gift to children, with a clear intention that it shall apply to existing illegitimate children, will be so applied, although the gift must be extended to future legitimate children. See *In re Haseldine*; *Grange v. Sturdy*, 31 Ch. D. 511.

Reputed children already born may take under gift to children of a man.

IV. A gift to illegitimate children described with reference to their paternity is valid as regards children, who at the date of the will have acquired the reputation of being the children of the father named. *Metham v. Duke of Devon*, 1 P. W. 529; *Wilkinson v. Adam*, 1 V. & B. 422.

Illegitimate child *en ventre* at the date of the will.

V. With regard to an illegitimate child *en ventre sa mère* at the date of the will, such a child can take if it is sufficiently designated; thus, a bequest to the child with which a woman is at the time pregnant is a good bequest, as there can be no

uncertainty. *Evans v. Massey*, 8 Pr. 22; *Gordon v. Gordon*, Chap. XXIII. 1 Mer. 142; see *In re Shaw*; *Robinson v. Shaw*, (1894) 2 Ch. 573.

And where a gift to the children of a woman applies to illegitimate children, an illegitimate child *en ventre* at the date of the will is admitted to share. *Crook v. Hill*, 3 Ch. D. 773.

But if a child is described with reference either to the fact or the reputation of paternity there seems to be considerable doubt whether the bequest is not void for uncertainty. To establish the fact of paternity would involve an inquiry which the law will not allow, and it is doubtful whether an illegitimate child can acquire a title by repute till it is born. See *Earle v. Wilson*, 17 Ves. 528; *In re Bolton*; *Brown v. Bolton*, 31 Ch. D. 542; *In re Shaw*; *Robinson v. Shaw*, (1894) 2 Ch. 573.

Whether child *en ventre* can acquire a title by repute.

In *Gordon v. Gordon*, (sup. cit.), Lord Eldon says: "A bastard cannot take as the issue of a particular person until it has acquired the reputation of being the child of that person, which cannot be before its birth." (See, too, *Metham v. Duke of Devon*, 1 P. W. 529; *Blodwell v. Edwards*, Cro. El. 509; see 1 Co. Litt. 3 b.)

On the other hand, both Lord St. Leonards and Lord Romilly seem to have thought that an illegitimate child *en ventre* may have a name by reputation. "A child *en ventre sa mère* is a child *in esse*, and may have a name by reputation," *per* Lord St. Leonards in *In re Connor*, 2 J. & Lat. p. 460; and "It is undoubtedly true that a child *en ventre sa mère* may acquire a name by reputation although illegitimate," *per* Lord Romilly in *Pratt v. Matthew*, 22 B. p. 339.

VI. There is no rule of public policy, which prevents illegitimate children born after the date of the will and before the testator's death from taking. *Occleston v. Fullalove*, 9 Ch. 147; *In re Hastie's Trusts*, 35 Ch. D. 728, overruling *In re Connor*, 2 J. & Lat. 456; *Medworth v. Pope*, 27 B. 73; *Holt v. Sindrey*, 7 Eq. 176; *Howarth v. Mills*, L. R. 2 Eq. 391, so far as they decide the contrary.

Public policy as to afterborn illegitimate children.

VII. When the theory that it was against public policy to allow illegitimate children born in the testator's lifetime but after the date of the will to take was abolished, it might have

Afterborn illegitimate children.

Chap. XXIII. been expected that, when once the intention to benefit illegitimate children was established, a will would receive the same construction for their benefit as it does in the case of legitimate children.

The rule of English law in this matter has however been to visit the sins of the fathers on the children, and though the severity of the law has been mitigated in some respects, the old rule remains in force for many purposes. The law is in fact in a transitional stage, and it is difficult to reconcile all the cases with principle.

The cases go to this:—

Under a gift to illegitimate children of a woman living at the testator's death children born after the date of the will come in. *In re Hustie's Trusts*, 35 Ch. D. 728.

And a gift to the reputed children of a man born or to be born by a particular woman is valid as regards children who have acquired the reputation at the testator's death. *Occleston v. Fullalove*, 9 Ch. 147.

Born after
the date of
the will.

It is not clear whether express words of futurity referring to children born after the date of the will are necessary. See *In re Goodwin's Trust*, 17 Eq. 345.

If the description refers to the fact and not the reputation of paternity it has been said that illegitimate children born after the date of the will cannot take, as to establish the fact of paternity an inquiry would be necessary which the law does not allow. *In re Bolton*; *Brown v. Bolton*, 31 Ch. D. 542, overruling *In re Goodwin's Trust*, 17 Eq. 345. *In re Bolton*, may, however, be supported on other grounds, and if a gift to the illegitimate children of a man is valid as regards those who have at the date of the will acquired the reputation of being his children (see *ante*) it is difficult on principle to see why the same construction should not be applied to after-born illegitimate children.

Illegitimate
children
born after
death.

VIII. Illegitimate children born after the testator's death and not *en ventre* can in no case take under the will. To admit them would be to encourage immorality. *Crook v. Hill*, 3 Ch. D. 773; *In re Shaw*; *Robinson v. Shaw*, (1894) 2 Ch. 573.

B. LEGITIMATE CHILDREN.

1. *Children primâ facie* includes children by a first and second marriage. *Barrington v. Tristram*, 6 Ves. 345; *Critchett v. Taynton*, 1 R. & M. 541; *Andrews v. Andrews*, 15 L. R. Ir. 199.

The term children includes children by a first and second marriage.

And even where there was an express reference to a present or any future husband, children by a former husband were not excluded. *Pasmore v. Huggins*, 21 B. 103; *Re Pickup's Will*, 1 J. & H. 389.

But there may be an intention to exclude the children of a first marriage. *Stavers v. Barnard*, 2 Y. & C. C. 539; *Lovejoy v. Carter*, 35 B. 149.

2. A gift to the children of a living person will not go to his grandchildren, though he may have only grandchildren living at the date of the will and the testator's death. *Moor v. Raisbeck*, 12 Sim. 123.

Children do not include grandchildren.

If, however, the gift is to the children of a person deceased, who had only grandchildren living at the time, the grandchildren will take, and they will take to the exclusion of great-grandchildren. *Berry v. Berry*, 3 Giff. 134; 9 W. R. 889; *Fenn v. Death*, 23 B. 73.

But a gift to the children of a deceased person, who has only grandchildren living at the date of the will, will not go to the grandchildren if the will distinguishes between children and grandchildren. *Loring v. Thomas*, 3 Dr. & S. 497.

And a gift to the children of several persons deceased will not include the grandchildren of one who had no children at the date of the will if there are any children of the others to take. *Radcliffe v. Buckley*, 10 Ves. 195; *In re Kirk*; *Nicolson v. Kirk*, 52 L. T. 346; see *In re Smith*; *Lord v. Hayward*, 35 Ch. D. 558.

3. A gift to children hereafter to be born or that may be born will not, without more, exclude children already born. *Hibblethwait v. Cartwright*, Ca. t. Talb. 31; *Wilkinson v. Adam*, 1 V. & B. 422, 464; *Doe v. Hallett*, 1 M. & S. 124; *Harrison v. Harrison*, 1 R. 10 Eq. 290. See *Locke v. Dunlop*, 39 Ch. D. 387.

Gift to children to be born will not exclude those born already.

Chap. XXIII.

But where there are gifts to three out of four children living at the date of the will, a gift to each child that may be born applies only to after-born children. *Early v. Middleton*, 14 B. 453; 3 D. F. & J. 1.

Posthumous children.

And in the same way a testator may confine his bounty to posthumous children. *Doe d. Blakiston v. Haslewood*, 10 C. B. 544; see *White v. Barber*, 5 Burr. 2703; *Re Lindsay*, 3 Ir. Ch. 239.

After-born children, where excluded.

4. Words *primâ facie* referring to present children, such as "to children lawfully gotten," or "to every child he hath," will not exclude after-born children if they can fairly be construed as referring to the *stirps*. *Browne v. Groombridge*, 4 Mad. 495; *Ringrose v. Bramham*, 2 Cox, 384; see *Goodfellow v. Goodfellow*, 18 B. 356.

A gift to "children who survive me" will not exclude those born after the testator's death. *Re Clark's Estate*, 3 D. J. & S. 111.

Express gift to a child will not exclude him from a subsequent gift to children.

5. An express gift to one child will not prevent his taking under a subsequent gift to children. *Reay v. Rawlins*, 29 B. 88; see *Hanna v. Bell*, 7 Ir. Ch. 208.

Nor will a gift to A. and her daughter for their lives exclude the daughter from taking under a gift in remainder to the children of A. and her daughter. *Almack v. Horn*, 1 H. & M. 630.

On the other hand, a gift to several children by name will not prevent other children from taking under a subsequent gift to children. *Moffat v. Burnie*, 18 B. 211; see *Re Connor*, 8 Ir. Eq. 401.

A gift to children "from A. downwards" includes A. *Lett v. Osborne*, 47 L. T. 40.

Children of parents dead at the date of the will.

6. When there is a gift to the members of a class for their lives, with remainder to their children, the death of a member of the class in the lifetime of the testator after the date of the will will not prevent his children from taking, but the children of members of the class dead at the date of the will will not take. *Habergham v. Ridehalgh*, 9 Eq. 395.

On the other hand, if the gift is to the testator's brothers and sisters for their lives, with remainder to their children, and the

testator has only one brother living at the date of the will, Chap. XXIII. children of deceased brothers and sisters will take. *Barnaby v. Tassell*, 11 Eq. 363.

7. Gifts to the children of A. & B.

a. It seems that the *prima facie* grammatical construction of a gift to the children of A. and B. is that B. and the children of A. are entitled. *In re Featherstone's Trusts*, 22 Ch. D. 111. Gifts to the children of A. and B.

b. If A. & B. are described as bearing the same relation to the testator, and equal legacies have been given to them, the children of both take—as in a gift to the children of my brother A. and my brother B. *Mason v. Baker*, 2 K. & J. 567; see *Whicker v. Mitford*, 3 B. P. C. 442.

c. If they do not bear the same relation to the testator, and A. has children at the date of the will, while B. is unmarried, the gift goes to B. and the children of A. *Stummvoll v. Hales*, 34 B. 124.

d. So, too, if A. is described as deceased; for instance, if the gift be to the children of the late A. & B., B. and the children of A. will take. *Lugar v. Harman*, 1 Cox, 250; *Hawes v. Hawes*, 14 Ch. D. 614; but see *Re Davies' Will*, 29 B. 93.

This is *à fortiori* the case where B. is referred to as a legatee. *Ingle's Trusts*, 11 Eq. 578.

e. A gift for "the benefit of the children of A. and of B." goes to the children of A. and of B. *Peacock v. Stockford*, 3 D. M. & G. 73.

8. If there is a gift to the six children of A. who has only six living at the date of the will, the legacy goes to them. *Sherer v. Bishop*, 4 B. C. C. 55. Gift to a certain number of children when there are more.

And a seventh child *en ventre* at that time will not be admitted to a share. *Re Emery's Estate*, 24 W. R. 917.

But if the number does not correspond with the number living at the date of the will, all the children then living will take, whether the gift is of a lump sum or of a distinct sum to each, in which latter case each child will be entitled to a legacy of that sum. *Garvey v. Hibbert*, 19 Ves. 125; *Stebbing v. Walkey*, 2 B. C. C. 85; 1 Cox, 250; *Lee v. Pain*, 4 Ha. 249; *Harrison v. Harrison*, 1 R. & M. 72; *Morrison v. Martin*, 5 Ha. 507; *Yeats v. Yeats*, 16 B. 170; see 4 Ch. D. 46; *Lee v.*

Chap. XXIII. *Lee*, 10 Jur. N. S. 1041; *Spencer v. Ward*, 9 Eq. 507; *In re Bassett's Estate*; *Perkins v. Fladgate*, 14 Eq. 54.

The fact that a blank is left for the insertion of the names of the legatees makes no difference. *M'Kechnie v. Vaughan*, 15 Eq. 289.

Evidence of intention to benefit certain children.

In such cases evidence of intention is not admissible to show that the testator meant certain of the children, or the children of a particular marriage who may correspond in number with the number mentioned in the will. *Daniell v. Daniell*, 3 De G. & S. 337; *Matthews v. Foulshaw*, 12 W. R. 1141.

Thus under a bequest to the two children of my son Joseph, who had four living at the date of the will, two by a first and two by a second marriage, all the children took, and evidence of an intention to benefit the children of the first marriage was not admitted. *Matthews v. Foulshaw*, *supra*.

On the same principle, a gift to the five daughters of A., who has one daughter and five sons, goes to the daughter. *Lord Selsey v. Lord Lake*, 1 B. 151. See *Berkeley v. Pulling*, 1 Russ. 496.

But a gift of 100*l.* a-piece to the four sons of A. who had three sons and a daughter, includes the daughter, the intention being to give four legacies. *Lane v. Green*, 4 De G. & S. 239.

Explanatory context.

If there is anything to indicate which of the children the testator meant—for instance, an allusion to their residence—the rule does not apply. *Wrightson v. Calvert*, 1 J. & H. 250; see *Hampshire v. Peirce*, 2 Ves. Sen. 216.

So where the gift was to the three children of W., widow of W., and the widow of W. had at the date of the will married again, and there were two children by W. and six by her second husband then living, it was held that the two children by the first marriage were alone intended to take. *Newman v. Piercey*, 4 Ch. D. 41.

It appears never to have been decided whether, when the number of children living at the date of the will is erroneously stated, children born after the date of the will and before the testator's death would be included.

III. DISTRIBUTION PER CAPITA AND PER STIRPES.

A gift to A. and the children of B. goes *primâ facie* to all *per capita*, and not *per stirpes*. *Dowding v. Smith*, 3 B. 541; *Rickabe v. Garwood*, 8 B. 579.

Whether a gift to the children of several parents is to be distributed *per stirpes* or *per capita*.

So, too, a gift to the children of A. and B., or even to class A., and class B. and C., goes *per capita* to all. *Dugdale v. Dugdale*, 11 B. 402; *Dowding v. Smith*, 3 B. 541; *Pattison v. Pattison*, 19 B. 638; *Armitage v. Williams*, 27 B. 346; *Rook v. A.-G.*, 31 B. 313; *Amson v. Harris*, 19 B. 210; *Tyndale v. Wilkinson*, 23 B. 74; *Baker v. Baker*, 6 Ha. 269; *Fletcher v. Fletcher*, 9 L. R. Ir. 301.

So a gift of two fourth parts to the children of A. and the children of B. goes *per capita*. *Lady Lincoln v. Pelham*, 10 Ves. 166.

Similarly a gift to several and their issue, or to the children and grandchildren of A., goes to all children and grandchildren coming into being before the period of distribution *per capita*. *Barnaby v. Tassell*, 11 Eq. 363; *Lea v. Thorp*, 6 W. R. 480; 4 Jur. N. S. 447; 27 L. J. Ch. 649.

Gifts to parents and their issue.

In the same way a gift after a life interest to surviving children and their issue goes to all the children and issue who survive the period of distribution *per capita*. *Re Fox's Will*, 35 B. 163; 13 W. R. 1013; *Cancellor v. Cancellor*, 11 W. R. 16; 2 Dr. & Sm. 199. *Shailer v. Groves*, which, as reported in 6 Hare, 162, might be cited in favour of a different construction, is there wrongly reported. See 11 Jur. 485; 16 L. J. Ch. 367; 2 Jarman Ed. 5, 1548.

The rule applies where the classes are next-of-kin or families. *Rook v. A.-G.*, 31 B. 313; *Barnes v. Patch*, 8 Ves. 603.

A direction that parents and children are to be classed together, and share in equal proportions, will not import a distribution *per stirpes*. *Turner v. Hudson*, 10 B. 222.

The following indications of intention have been held sufficient to import a distribution *per stirpes*—

Distribution *per stirpes*.

a. A gift of one share in certain events to the other legatees *per stirpes*. *Nettleton v. Stephenson*, 18 L. J. Ch. 191.

b. A gift of the share of a child dying, not to the other

Chap. XXIII. members of the class, but to the brothers and sisters of the child. *Archer v. Legg*, 31 B. 187; see *Ayscough v. Savage*, 13 W. R. 373.

c. A gift of the income to four persons till certain children attained twenty-one, and then a gift of the principal to three of those persons and the children equally. *Brett v. Horton*, 4 B. 239.

d. A direction that the share is to be divided in equal shares if more than one of "such respective issue." *Davis v. Bennett*, 4 D. F. & J. 327.

e. If the issue of a *stirps* are treated as taking among them only one equal share, the construction *per stirpes* will be adopted. *Brett v. Horton*, 4 B. 239; *Hunt v. Dorsett*, 5 D. M. & G. 570.

As to the word "devolve," see *Stonor v. Curwen*, 5 Sim. 264.

A gift to several and their issue "*per stirpes*," or a direction that issue are to take only their parents' share, is sufficient to show that the issue were not meant to take in competition with the original takers. *Pearson v. Stephen*, 2 Dow. & Cl. 328; 5 Bl. N. S. 203; *Johnson v. Cope*, 17 B. 561.

In what cases the distribution will be *per stirpes* throughout.

Whether a direction, that issue are to take only the share their ancestor would have taken, will have the effect of making the distribution a distribution *per stirpes* throughout, seems not to be settled.

The word parent used in a recurring or sliding sense.

Where the direction is that the issue are to take a parent's share, and the word "parent" is used in a recurring or sliding sense, so as to apply to successive generations of issue, it is clear that the distribution will be *per stirpes* throughout. *Ross v. Ross*, 20 B. 645; *In re Orton's Trust*, 3 Eq. 375; *Palmer v. Cruttwell*, 8 Jur. N. S. 479.

So, too, where the direction is that the children or grandchildren are to take an original share between them. *Powell v. Powell*, 28 L. T. N. S. 730.

But a mere direction that the share of any of the original takers dying is to go to his issue would, it seems, not have the effect of preventing remoter issue from taking that share with issue less remote *per capita* between them. *Birdsall v. York*,

5 Jur. N. S. 1237; *Southam v. Blake*, 2 W. R. 446; *Weldon v. Hoyland*, 4 D. F. & J. 564. *Robinson v. Sykes*, 23 B. 40, which is *contra*, was on a marriage settlement. Chap. XXIII.

If the gift is to several, and their issues *per stirpes*, the distribution *per stirpes* will be carried through throughout, so that no children or remoter issue can take in competition with the parents. *Dick v. Lacy*, 8 B. 214; *Gibson v. Fisher*, 5 Eq. 51. Effect of the words *per stirpes*.

When the gift is to several for life, and then to their children, the cases are not easily reconcileable. Gift to parents for life and then to their children.

1. It seems clear that a gift to A. and B., as tenants in common for their lives, and then at their death, or at or after their deaths, or at the death of A. and B., to their children, goes, upon the death of each tenant for life, to his children. *Flinn v. Jenkins*, 1 Coll. 365; *Tanière v. Pearkes*, 2 S. & St. 383; *Willes v. Douglas*, 10 B. 47; *Arrow v. Mellish*, 1 De G. & S. 355; *Waldron v. Boulter*, 22 B. 284; *Turner v. Whittaker*, 23 B. 196; *Saril v. Saril*, 23 B. 87; *In re Hutchinson's Trusts*, 21 Ch. D. 811; see, too, *Doe d. Patrick v. Royle*, 13 Q. B. 100; *Brown v. Jarvis*, 2 D. F. & J. 168.

If the gift is after the deaths of the tenants for life to their children and grandchildren, the families take *per stirpes*, but the children and grandchildren take *per capita inter se*. *Barnaby v. Tassell*, 11 Eq. 363.

But if the testator goes on to explain what he means by "their children," by adding "that is to say, the children of A. and B.," they take *per capita*. *Abrey v. Newman*, 16 B. 431.

2. If the gift be to A. and B. for their lives, and at their death not to their children but to the children of A. and B., there seems less reason for contending that the children are to take *per stirpes*. Gift to A. and B. for life, then to children of A. and B.

However, in *Wells v. Wells*, 20 Eq. 342, the construction *per stirpes* was adopted. See *Milnes v. Aked*, 6 W. R. 430; *Sutcliffe v. Howard*, 38 L. J. Ch. 472; *Re Nott's Trusts*, 20 W. R. 569.

In such a case a superadded direction that, "if there is but one child, the whole is to go to such only child," would afford an argument that the distribution was meant to be *per capita*. *Pearce v. Edmeades*, 3 Y. & C. Ex. 246; 2 W. R. 672; *Swabey*

Chap. XXIII. *v. Goldie*, 1 Ch. D. 380; see, too, *Peacock v. Stockford*, 7 D. M. & G. 129.

Gift to
children after
death of
surviving
tenant for
life.

3. If the gift to the children is not till after the death of the survivor of the tenants for life, it would seem the distribution will be *per capita*; at any rate if the gift is to the children of A. and B., and not merely to "their children." *Malcolm v. Martin*, 3 B. C. C. 50; *Pearce v. Edmeades*, 3 Y. & C. Ex. 246; *Stevenson v. Gullan*, 18 B. 590; *Nockolds v. Locke*, 3 K. & J. 6; *Swabey v. Goldie*, 1 Ch. D. 380; see *Alt v. Gregory*, 8 D. M. & G. 221. Perhaps *Smith v. Streatfield*, 1 Mer. 358, comes under this head.

But the children will take *per stirpes* if there is any reference to classes of children, such as a gift to the children of each of the tenants for life. *In re Campbell's Trusts*, 31 Ch. D. 685; 33 Ch. D. 98.

Substitutional
gifts.

If the gift is substitutional, as to several or their children, the children take *per stirpes*. *Congreve v. Palmer*, 16 B. 435; *Timins v. Stackhouse*, 27 B. 434; *Gowling v. Thompson*, 19 L. T. 242; *In re Sibley's Trusts*, 5 Ch. D. 494.

A simple gift, however, to several or their issue, though it would import a distribution *per stirpes* among the families, would not prevent all the issue of each family from taking *per capita inter se*. *Gowling v. Thompson*, 19 L. T. 242; *In re Sibley's Trusts*, 5 Ch. D. 494.

How the
stirpes ascer-
tained.

Under a gift to cousins then living and the issue of those then dead, according to the stocks, where the cousins were referred to as the children of the testator's late aunts and uncles, it was held that the cousins and not the aunts and uncles were to be taken as the stocks. *In re Wilson*; *Parker v. Winder*, 24 Ch. D. 664.

Where the gift is to the descendants of A. and B. *per stirpes*, Lord Westbury held that there should be as many shares as there are families in existence at the testator's death, each family taking a share. *Robinson v. Shepherd*, 10 Jur. N. S. 53; 12 W. R. 234; 4 D. J. & S. 129.

On the other hand, Lord Romilly held that A. and B. were the original *stirpes*, and that this mode of division was to be carried out throughout. *Gibson v. Fisher*, 5 Eq. 51.

CHAPTER XXIV.

RULES FOR ASCERTAINING CLASS.

I. AS REGARDS PERSONALTY.

FOR the purpose of ascertaining the class to take under a gift of a fund the Court has adopted certain rules of convenience, the principle being that the class is to be ascertained as soon as possible in order that the beneficiaries may know what their shares are and that the executor may distribute the fund.

Chap. XXIV.

Rule as to
fund of
personalty.

These rules are as follows :—

1. Under a direct gift to a class without any provisions as to time of vesting, if any members of the class are born at the testator's death they take to the exclusion of afterborn members. *Hill v. Chapman*, 1 Ves. Jun. 405 ; 3 B. C. C. 391 ; *Viner v. Francis*, 2 Cox, 190 ; *Davidson v. Dallas*, 14 Ves. 576.

Direct gifts.

The class will not be enlarged by a gift over on death of any of the class under twenty-one, nor by a gift over in default of children. *Davidson v. Dallas*, 14 Ves. 576 ; *Berkeley v. Swinburne*, 16 Sim. 275 ; *Andrews v. Partington*, 3 B. C. C. 401 ; see *Hutcheson v. Jones*, 2 Mad. 124.

Effect of gift
over.

If there are no children at the testator's death all the children whenever born are entitled. *Weld v. Bradbury*, 2 Vern. 705 ; *Shepherd v. Ingram*, Amb. 448 ; *Hutcheson v. Jones*, 2 Mad. 124 ; *Harris v. Lloyd*, T. & R. 310.

No children
at death.

2. In the case of a gift in remainder or after a trust to accumulate, all children born at the death of the testator and coming into *esse* before the death of the tenant for life or the end of the period of accumulation, take a share to the exclusion of those born afterwards. *Middleton v. Messenger*, 5 Ves. 136 ; *Odell v. Crone*, 3 Dow, 61 ; *Holland v. Wood*, 11 Eq. 91 ;

Future gifts.

Chap. XXIV. *Barnaby v. Tassell*, 11 Eq. 363; *Watson v. Young*, 28 Ch. D. 436.

If the life interest is determinable on bankruptcy or some other event, the class is fixed at the time of determination, unless there is something in the context to enlarge the class, such as postponement of payment till the death of the tenant for life or a declaration that the fund is to go as if the tenant for life were dead. *Re Smith*, 2 J. & H. 594; *Aylwin's Trusts*, 16 Eq. 585; *Brandon v. Aston*, 2 Y. & C. C. 24, 30; *In re Bedson's Trusts*, 25 Ch. D. 458; 28 Ch. D. 523.

If no children are born before the death of the tenant for life all after-born children are admitted. *Chapman v. Blissett*, Ca. t. Talb. 145; *Wyndham v. Wyndham*, 3 B. C. C. 58.

But this rule does not apply, if there is a clear intention, that distribution is to be made once for all when the fund falls into possession. *Godfrey v. Davis*, 6 Ves. 43; explained in *Conduitt v. Soane*, 4 Jur. N. S. 502.

Imperfect
limitations.

3. In cases where the limitations are imperfect, for instance, where there is a gift to A. during life or widowhood, with a gift over on her death, and A. marries again, the class to take under the gift over will be ascertained when the prior limitation is out of the way—in the case put, on A.'s remarriage, although the interest of members may be expressed to be contingent upon surviving the tenant for life. *Bainbridge v. Cream*, 16 B. 25; *Stanford v. Stanford*, 34 Ch. D. 362; *In re Tucker*; *Bowchier v. Gordon*, 56 L. J. Ch. 449; 56 L. T. 118; 35 W. R. 344; *In re Dear*; *Helby v. Dear*, 58 L. J. Ch. 659; 61 L. T. 432; 38 W. R. 31.

Gift of
reversionary
property.

4. On the same principle if the interest bequeathed is reversionary, the class remains open till the interest falls into possession. *Walker v. Shore*, 15 Ves. 122; *Harvey v. Stracey*, 1 Dr. 122.

But this does not apply where a residue is given and some portion of the property which falls into it is reversionary, unless there are provisions indicating an intention to treat the reversionary property separately. *Hill v. Chapman*, 1 Ves. Jun. 405; 3 B. C. C. 391; *Hagger v. Payne*, 23 B. 474; *Coventry v. Coventry*, 2 Dr. & Sm. 470; *King v. Cullen*, 2 De G. & S. 252.

5. If there is a direct gift "to be paid at twenty-one, or to such as attain twenty-one:"

Chap. XXIV.

Gift to be
paid at
twenty-one.

a. If any member of the class attain twenty-one in the testator's lifetime the class is fixed at the testator's death. *Hagger v. Payne*, 23 B. 474.

A child *en ventre* at the testator's death was held not to be included in *In re Gardiner's Estate*; *Garratt v. Weeks*, 20 Eq. 647, *sed quære*, see *Bortoft v. Wadsworth*, 12 W. R. 523.

b. If none attain twenty-one in the testator's lifetime, all born at the testator's death and coming into existence before the eldest attains twenty-one are admitted. *Hoste v. Pratt*, 3 Ves. 729; *Balm v. Balm*, 3 Sim. 492; *Blease v. Burgh*, 2 B. 221; *Oppenheim v. Henry*, 10 Ha. 441; *Gillman v. Daunt*, 3 K. & J. 48; *Locke v. Lamb*, 4 Eq. 372; *Gimblett v. Purton*, 12 Eq. 427; *In re Knapp's Settlement*; *Knapp v. Vassall*, (1895) 1 Ch. 91.

As a rule each child attaining twenty-one is entitled to have his share paid to him, but this is not so if the whole income is given for maintenance and there are children who require maintenance. *Berry v. Briant*, 2 Dr. & Sm. 1.

c. It seems doubtful whether, if there are no children at the testator's death, all would be admitted whether born before or after the eldest attains twenty-one. *Armitage v. Williams*, 27 B. 346, better reported in 7 W. R. 650, which seems an authority for the affirmative, was probably decided on the authority of *Mainwaring v. Beevor*, *post*; see *Harris v. Lloyd*, T. & R. 310.

There are the following exceptions to the rule:—

a. Where after a life interest there was a gift to the grandchildren of the testator's brother followed by a direction that it was to be received by them when they should severally attain twenty-five years of age, it was held that only grandchildren living at the death of the tenant for life were entitled. The gift would have been void for perpetuity if, according to the ordinary rule, the class had been ascertained when the eldest grandchild attained twenty-five. *Kevern v. Williams*, 5 Sim. 171; see, too, *Elliott v. Elliott*, 12 Sim. 276. No reasons are given for the decision in *Kevern v. Williams*. Both cases are unsatisfactory. *Elliott v. Elliott* has however been followed in

Exceptions to
the general
rule.

Kevern v.
Williams;
Elliott v.
Elliott.

Chap. XXIV. *In re Coppard*; *Howlett v. Hodson*, 35 Ch. D. 355; but see *In re Wenmoth's Estate*; *Wenmoth v. Wenmoth*, 37 Ch. D. 266, p. 270; *In re Mervin*; *Mervin v. Crossman*, (1891) 3 Ch. 197.

Maintenance out of vested and presumptive shares.

b. Maintenance out of the shares or presumptive shares of children will not extend the class. *Gimblett v. Purton*, 12 Eq. 427.

But if maintenance and advancement are continued beyond the time when the eldest child attains twenty-one, if, for instance, advancement is directed out of vested and presumptive shares, all children will be let in. *Iredell v. Iredell*, 25 B. 485; *Bateman v. Gray*, 6 Eq. 215.

In *Defflis v. Goldschmidt*, 19 Ves. 566; 1 Mer. 417, where expressions were used showing that the parent could not die leaving a child who would not be entitled to maintenance, all children were included. See *Evans v. Harris*, 5 B. 45.

Distribution when the youngest attains twenty-one.

c. If distribution is to be made when all attain twenty-one, or when the youngest attains twenty-one, all children will be admitted. *Hughes v. Hughes*, 3 B. C. C. 434; 14 Ves. 256; *Mainwaring v. Beevor*, 8 Ha. 44; *Pilkington v. Pilkington*, 29 L. R. Ir. 370; and perhaps *Armitage v. Williams*, 27 B. 346; 7 W. R. 650.

On the other hand, the class would again be restricted if the distribution is to be made when the youngest for the time being attains twenty-one. *Gooch v. Gooch*, 14 B. 565; 3 D. M. & G. 366.

Gift of fixed sum to each member of a class.

d. When the gift is of a particular sum to each member of the class, the class is fixed at the death of the testator, whether possession is postponed to twenty-one or not. *Ringrose v. Bramham*, 2 Cox, 384; *Storrs v. Benbow*, 2 M. & K. 46; 3 D. M. & G. 390; *Butler v. Lowe*, 10 Sim. 317.

And if there are no children then in existence, the gift fails. *Mann v. Thompson*, Kay, 638; *Rogers v. Mutch*, 10 Ch. D. 25.

Gift to children who attain twenty-one after life interest.

6. If the gift is to A. for life, then to children who attain twenty-one, the class will be fixed as regards exclusion at the death of A., or when the eldest attains twenty-one, whichever is last. *Clarke v. Clarke*, 8 Sim. 59; *Robley v. Ridings*, 11 Jur. 813; *Beckton v. Barton*, 27 B. 99; 5 Jur. N. S. 349; *Parsons*

v. Justice, 34 B. 598; *In re Emmet's Estate*; *Emmet v. Emmet*, Chap. XXIV. 13 Ch. D. 484; *In re Knapp's Settlement*, (1895) 1 Ch. 91.

In *Parsons v. Justice* a direction that no child should be excluded in consequence of any other child having attained a vested interest had no effect in extending the class.

7. A child *en ventre* at the time when the class closes is admitted to share, even though the word "living" or "born" be added to the description. *Doe v. Clarke*, 2 H. Bl. 399; *Clarke v. Blake*, 2 B. C. C. 319; *Trower v. Butts*, 1 S. & St. 181.

Children *en ventre* when the class closes are admitted.

Quere whether *Garratt v. Weeks*, 20 Eq. 647, is consistent with the other authorities.

Similarly, when there is a gift to the children of a tenant for life, a gift over, if at the end of five years she has not had a child, will not take effect if she then has a child *en ventre*. *Pearce v. Carrington*, 8 Ch. 69.

A child *en ventre* is for this purpose supposed to be born at the time of distribution; if, therefore, supposing it to have been then born, it would have been illegitimate, it will not be admitted to take, notwithstanding the marriage of its parents before its birth. *In re Corlass*, 1 Ch. D. 460.

Case of child conceived before but born after marriage.

But though a child *en ventre* is looked upon as existing for the purpose of receiving a benefit, it is not looked upon as existing for any other purpose; if, for instance, distribution is to be made when the youngest child for the time being attains twenty-one, the fact that there is a child *en ventre* when the youngest attains twenty-one will not postpone the division. *Blasson v. Blasson*, 2 D. J. & S. 665.

II. AS REGARDS GIFTS OF INCOME.

Even as regards personalty the rules already stated do not apply when the reason for their application does not exist. Thus, under a gift of income to grandchildren during their lives, all grandchildren whenever born will be admitted. *In re Wenmoth's Estate*; *Wenmoth v. Wenmoth*, 37 Ch. D. 266.

Gifts of income

Chap. XXIV.

III. AS REGARDS REAL ESTATE.

Rules as to
reality.

The principle upon which the rules applicable to personality for ascertaining the class of takers rest, namely, an early distribution of the estate, does not apply to real estate.

Immediate
devisees.

1. Upon the question as to who are to take under a devise of real estate to the children of A. the cases are conflicting.

There is authority for saying that the doctrine of the common law that an estate of freehold cannot be limited to commence in futuro must be applied, so that a child born after the testator's death cannot take. *Singleton v. Gilbert*, 1 Cox, 68; S. C. sub nom. *Singleton v. Singleton*, 1 B. C. C. 541 n; *Scott v. Harwood*, 5 Mad. 322, where the devise appears to have been equitable. *Wild's Case*, 6 Rep. 16 b., also supports this view, and see the observations of Downes, C. J., in *Crone v. Odell*, 1 Ba. & Be. 449, p. 458; see, too, *Fearne*, 532; *Sheph. Touchstone* by Preston, 436.

On the other hand there is also authority for saying that the technical rule of the common law does not apply to wills, and that a devise to children may be treated as an executory devise, so that all children born at the testator's death and afterwards coming into existence would take a share. *Cook v. Cook*, 2 Vern. 545; *Shepherd v. Ingram*, Amb. 448, a residue of real and personal estate. See the arguments in *Mogg v. Mogg*, 1 Mer. 654, 676, 682. The point is also discussed in the notes to *Weld v. Bradbury*, 2 Vern. 705.

Children born
and to be
born.

If the devise is to children begotten and to be begotten, the devise must be construed as executory, so as to let in all the children whether born before or after the testator's death. *Mogg v. Mogg*, 1 Mer. 654; *Eddowes v. Eddowes*, 30 B. 603; see *Gooch v. Gooch*, 14 B. 565; 3 D. M. & G. 366; *O'Hea v. Slattery*, (1895) 1 R. 7.

Contingent
remainder.

2. A devise of the legal estate to A. for life with remainder to a class of children is governed, in the case of wills not executed, revived or republished after the 2nd of August, 1877, by the rules of law applicable to contingent remainders; that is to say, only those children can take whose interests become vested before the determination of the life interest. If there are none

at that time whose interests have become vested the devise in remainder fails. *Rhodes v. Whitehead*, 2 Dr. & Sm. 532; *Price v. Hall*, 5 Eq. 399; *Percival v. Percival*, 9 Eq. 386; *Brackenbury v. Gibbons*, 2 Ch. D. 417; *Cunliffe v. Brancker*, 3 Ch. D. 393. Chap. XXIV.

An ordinary devise to a tenant for life with remainder to his children who attain twenty-one comes within this rule and goes to those children only who have attained twenty-one at the death of the tenant for life. Distinction between contingent remainder and executory devise.

But if the devise in remainder is so worded as to show that the testator intended persons to take who might not have attained vested interests at the death of the tenant for life, the devise in remainder must be construed as an executory devise.

Thus, if the devise is to children born at the death of the tenant for life or thereafter to be born or to children who either before or after the death of the tenant for life should take a vested interest, the devise is executory. *In re Lechmere and Lloyd*, 18 Ch. D. 524; *Miles v. Jarvis*, 24 Ch. D. 633; *Dean v. Dean*, (1891) 3 Ch. 150, overruling on this point *Brackenbury v. Gibbons*, 2 Ch. D. 417.

And the same principle has been applied to a devise in remainder to children who should attain twenty-one, where there was a maintenance clause to take effect after the death of the tenant for life as regards any minors, then presumptive shares. *In re Bourne*; *Rymer v. Harpley*, 56 L. J. Ch. 566; 56 L. T. 388; 35 W. R. 359.

If the legal estate is devised to trustees, or is outstanding, for instance in a mortgagee, the remainder is not a remainder in the strict sense of the word, and the rules as to contingent remainders do not apply. *In re Eddels' Trusts*, 11 Eq. 559; *Berry v. Berry*, 7 Ch. D. 657; *Astley v. Micklethwait*, 15 Ch. D. 59. See Dunning, Conc. Prec. 218, note. Equitable remainder in land.

The fact that after the death of the testator and after the passing of the Contingent Remainders Act, 1877, the mortgagee reconveyed the legal estate to the uses of the will was held not to render the remainders liable to destruction by the termination of the life estate before they vested. *Re Freme*; *Freme v. Logan*, (1891) 3 Ch. 167. Reconveyance of legal estate.

Chap. XXIV.

Who are
included
under execu-
tory devise.

3. A devise after a life interest to a class, if the devise to the class is to be construed as an executory devise, includes all members of the class who satisfy the description whenever they may be born. *Blackman v. Fysh*, (1892) 3 Ch. 209.

IV. CLASS TO TAKE IN DEFAULT OF APPOINTMENT.

At what time
the class to
take in
default of
appointment
is to be fixed.

When there is a gift to children, as A. may appoint, with no gift in default of appointment, and no appointment is made, similar rules apply as to the period at which the class is to be ascertained.

1. A direct gift to children, as A. may appoint, goes apparently to all the children living at the death of the testator, to the exclusion of those born afterwards, though before the death of A. *Coleman v. Seymour*, 1 Ves. Sen. 209.

2. A gift to A. for life, with remainder to his children as he shall appoint, goes to all the children born in the testator's lifetime and coming into being before A.'s death. *Crone v. Odell*, 1 Ba. & Be. 449; 3 Dow, 68; *Norman v. Norman*, Bea. 490; *Lambert v. Thwaites*, L. R. 2 Eq. 151.

Case when
the only gift
is through
the power.

3. If the only gift is through the power, so that the children take by implication only, in default of appointment, the rules are the same.

Thus, where there is a power to A. to dispose of certain property among children, the gift, in default of appointment, goes to those born at the testator's death, to the exclusion of those born subsequently. *Longmore v. Broom*, 7 Ves. 124.

And where the gift is to A. for life, and then to dispose of the capital among his children, all children born before A.'s death take a share. *Grieverson v. Kirsopp*, 2 Kee. 653.

4. If the donee of the power and the tenant for life are different persons, and the donee dies before the tenant for life, the class is ascertained at the death of the latter. *White's Trusts*, Johns. 656.

And, apparently, if there is anything to show that personal enjoyment by the beneficiaries was intended, those dying before the tenant for life would be excluded. *White's Trusts*, *supra*; *Carthew v. Enraght*, 20 W. R. 743; *In re Phene's Trusts*, 5 Eq. 346.

At what time the class would be ascertained if the donee of the power survives the tenant for life is uncertain; though by analogy to the case of a direct gift it seems it would be ascertained at the death of the tenant for life, and not of the donee of the power. Chap. XXIV.

5. When there is a direct vested gift to children as A. shall appoint, the fact that the power is to appoint by deed or will, or by will only, will not affect the class to take in default of appointment. *Casterton v. Sutherland*, 9 Ves. 445; *Falkner v. Lord Wynford*, 15 L. J. Ch. 8; *Lambert v. Thwaites*, L. R. 2 Eq. 151, see *Winn v. Fenwick*, 11 B. 438, there discussed. Power to appoint by deed or will.

6. If the only gift is through the power, only those will take in default of appointment who could have taken under the power; and therefore if the power is to dispose of certain property by will, only those who survive the donee can take in default of appointment. *Walsh v. Wallinger*, 2 R. & M. 78; *Kennedy v. Kingston*, 2 J. & W. 431; *Reid v. Reid*, 25 B. 469; *Freeland v. Pearson*, 3 Eq. 658; *In re Susanni's Trusts*, 47 L. J. Ch. 65; *Sinnott v. Walsh*, 5 L. R. Ir. 27; *Moore v. Ffolliot*, 19 L. R. Ir. 499; see *Brown v. Pocock*, 6 Sim. 257, where it does not appear from the report whether the wife survived her husband or not, see L. R. 2 Eq. 157.

7. On the other hand if the gift is to such children of A. as he shall by any writing appoint, all his children, whether or not they survive prior tenants for life or their own parent, are entitled to share. *Wilson v. Duguid*, 24 Ch. D. 244.

V. EFFECT OF WORDS OF FUTURITY.

Mere words of futurity, as, for instance, a gift to the children that may be born, will not extend the class. *Storrs v. Benbow*, 2 M. & K. 46; 3 D. M. & G. 390; *Townsend v. Early*, 3 D. F. & J. 1; see *Gibbons v. Gibbons*, 6 App. C. 471. How far words of futurity affect the ordinary rules for fixing the class to take under a gift to children.

Where the words are "born or to be born," the rules appear to be—

1. When the gift is after a life estate, such words will not extend the class. *Sprackling v. Ranier*, 1 Dick. 344; *Whitbread v. St. John*, 10 Ves. 152; *Parsons v. Justice*, 34 B. 598. Children born or to be born.

Chap. XXIV. The case is of course different if the gift is to children "now born or who shall be born in the lifetime of their parents." *Scott v. Earl of Scarborough*, 1 B. 154.

2. The rule is the same where the gift is to children now born or who may be born hereafter who shall attain twenty-one. *Iredell v. Iredell*, 25 B. 485; *Bateman v. Gray*, 29 B. 447; 6 Eq. 215.

3. In the case of a direct gift of personalty to children, the words "now born or to be born hereafter" would probably be held to be intended to refer to children born between the date of the will and the death. *Dias v. De Livera*, 5 App. C. 123.

For the meaning of the words "born in due time," see *In re Wass*; *Marshall v. Mason*, W. N. 1882, 158.

4. If the gift is of a legacy to each of the children begotten or to be begotten, the class will not be extended beyond the testator's death, as not merely the distribution of what the children are to take, but of the whole estate of the testator, would be indefinitely postponed. *Butler v. Lowe*, 10 Sim. 317.

CHAPTER XXV.

MEANING OF WORDS DESCRIPTIVE OF RELATIONSHIP.

I. NEPHEWS AND NIECES.

NEPHEWS and nieces mean *primâ facie* the children of brothers and sisters, including those of the half blood. *Falkner v. Butler*, Amb. 514; *Grieves v. Rawley*, 10 Ha. 63; *Cotton v. Scarancke*, 1 Mad. 45; see *Brigg v. Brigg*, 33 W. R. 454; *In re Reed*, 57 L. J. Ch. 790; 36 W. R. 682.

Chap. XXV.

Nephews and nieces mean *primâ facie* children of brothers and sisters.

The meaning of the word will not be enlarged where the gift is to each of the present nieces of A., who had only one niece of the first degree living at the date of the will. *Crook v. Whitley*, 7 D. M. & G. 490.

The fact that the gift is to "nephews, descendants of my brothers," will not enlarge the class. *Williamson v. Moore*, 10 W. R. 536.

The fact that a great-niece or a wife's niece has been previously called a niece will not enlarge the meaning of the word. *Shelley v. Bryer*, Jac. 207; *Thompson v. Robinson*, 27 B. 486; *Smith v. Liddiard*, 3 K. & J. 252; *Wells v. Wells*, 18 Eq. 504; *Merrill v. Morton*, 17 Ch. D. 382.

Nor will a gift to my great-nephew, and such other of my nephews and nieces as shall be living at my death. *Blower's Trusts*, 11 Eq. 97; 6 Ch. 351.

But if the testator has at the date of his will and death no nephews and nieces of his own, and there are nephews and nieces of his wife, they will take, though he may have had brothers and sisters living at the date of his will. *Hogg v. Cook*, 32 B. 641; *Sherratt v. Mountfield*, 15 Eq. 305; 8 Ch. 928; see

In what cases a wife's nephew may take.

Chap. XXV. *Adney v. Greatrex*, 17 W. R. 637; *In re Fish*; *Ingham v. Rayner*, (1894) 2 Ch. 83.

The words "nephews and nieces on both sides" include a wife's nephew. *Frogley v. Phillips*, 30 B. 168; 3 D. F. & J. 466.

If a great-nephew is referred to as taking a share of a gift to nephews and nieces, the words will be held to include grand-nephews and grand-nieces. *Weeds v. Bristow*, L. R. 2 Eq. 333.

And if the testator expressly defines a niece, as "my niece, daughter of my nephew," nephews and nieces will include grand-nephews and grand-nieces. *James v. Smith*, 14 Sim. 214.

A bequest to "male nephews" has been held to include only sons of brothers. *Lucas v. Cuddy*, I. R. 10 Eq. 514.

II. COUSINS.

Cousins.

The word cousins means primarily children of uncles and aunts. *Sanderson v. Bayley*, 4 M. & Cr. 56; *Caldecott v. Harrison*, 9 Sim. 457; *Stoddart v. Nelson*, 6 D. M. & G. 68; *Stevenson v. Abingdon*, 31 B. 305; *Burbey v. Burbey*, 9 Jur. N. S. 96.

Second cousins.

Second cousins are persons who have the same great-grandfather or great-grandmother, and will not therefore include first cousins once removed. *Corporation of Bridgnorth v. Collins*, 15 Sim. 541; *In re Parker*; *Bentham v. Wilson*, 50 L. J. Ch. 639; 15 Ch. D. 528; 17 Ch. D. 262.

But if there are no second cousins the term will include all within the same degree of relationship, unless there is an intention to exclude first cousins twice removed, for instance, by a substitutionary gift to the children of second cousins who had died. *Slade v. Fooks*, 9 Sim. 386; *In re Bonner*; *Tucker v. Good*, 19 Ch. D. 201.

First and second cousins.

In a gift to "first and second cousins," the words will have their strict meaning, unless there is something to show that the testator is not using them in their proper sense. *In re Parker*; *Bentham v. Wilson*, 15 Ch. D. 528, where *Mayott v. Mayott*, 2 B. C. C. 125, is explained, and *Charge v. Goodyer*, 3 Russ.

140; *Silcox v. Bell*, 1 S. & St. 301, are disapproved; see *Wilks* Chap. XXV. v. *Bannister*, 30 Ch. D. 512.

"Cousin" may include the wife of a cousin. *In re Taylor*; *Cloak v. Hammond*, 34 Ch. D. 255.

III. GRANDCHILDREN.

Similarly, grandchildren, unless explained by the context, will not include great-grandchildren. *Oxford v. Churchill*, 3 V. & B. 59. Grand-children.

But if the gift is to grandchildren herein named, a great-grandchild who has previously been called grandchild may take. *Hussey v. Berkeley*, 2 Ed. 194.

IV. ISSUE.

A bequest to issue as purchasers goes to all issue, children, grandchildren, &c., as joint tenants, and all come in who are in existence at the time of vesting in possession. *Davenport v. Hanbury*, 3 Ves. 257; *Maddock v. Legg*, 25 B. 531; *Weldon v. Hoyland*, 4 D. F. & J. 564; *Hobgen v. Neale*, 11 Eq. 48.

And in the case of a devise of realty, all such issue take as joint tenants for life, or in fee, according as the will dates before or since the Wills Act. *Cook v. Cook*, 2 Vern. 545; *Mogg v. Mogg*, 1 Mer. 654, 689; *Dalzell v. Welch*, 2 Sim. 319.

1. In the case of realty, however, this construction will be excluded if there is a general intention manifest to keep the estates together in a single line of enjoyment, in which case the estates will devolve according to the rule in *Mandeville's Case*. *Algood v. Blake*, L. R. 7 Ex. 339; *ib.* 8 Ex. 160; and see *Whitlock v. Heddon*, 1 B. & P. 243. Exceptions.

2. The generality of the word issue will be restrained if the testator explains that he meant by issue children. In what cases issue means children.

a. This will be the case if the word issue is coupled with parent: for instance, if, in a substitutional gift to issue, the issue are directed to take their parent's share. *Sibley v. Perry*, 7 Ves. 522; *Pruen v. Osborne*, 11 Sim. 132; *Smith v. Horsfall*, 25 B. 628; *Stevenson v. Abingdon*, 31 B. 305; *Macgregor v. Mac-*

Chap. XXV. *gregor*, 1 D. F. & J. 63 ; *Martin v. Holgate*, L. R. 1 H. L. 175 ; *Bryden v. Willett*, 7 Eq. 472 ; *Heasman v. Pearse*, 7 Ch. 275 ; *In re Judd's Trusts*, W. N. 1884, 206 ; see, however, *Ralph v. Carrick*, 11 Ch. D. 873.

This rule applies to a deed. *Barraclough v. Skillito*, 32 W. R. 875.

If, however, the word parent is not used in the sense of the first taker, whose share the issue are to take by substitution, but in what might be called a sliding sense, so as to denote child, grandchild, great-grandchild, and so on, it will not have the effect of cutting down issue to children. See *Ross v. Ross*, 20 B. 645, where the testator distinguished between a parent's share and a child's share, children being the first takers.

Effect of a gift over in default of issue.

The fact that there is a gift over in default of issue of the first takers affords an argument against construing issue as equivalent to children, though it is not in itself conclusive. See cases *supra cit.* ; *Re Kavanagh's Will*, 13 Ir. Ch. 120 ; *Corrie's Will*, 32 B. 426.

Gift over in default of children or issue.

But if the gift over is not merely in default of issue but in default of "children or issue," it would seem that the word issue cannot be restricted, though the issue are directed to take only a parent's share. *Ross v. Ross*, 20 B. 645 ; *Ralph v. Carrick*, 11 Ch. D. 873, 883.

Issue of issue.

b. Issue of issue must mean issue of children, if not children of children. *Pope v. Pope*, 14 B. 593 ; *Williams v. Teale*, 6 Ha. 239 ; *Heasman v. Pearse*, 7 Ch. 275.

So, too, children of issue will mean children of children. *Fairfield v. Bushell*, 32 B. 158

Issue of the marriage in a settlement.

c. In a marriage settlement limitations in favour of the "issue of the marriage" would probably be confined to children. *In re Dixon's Trusts*, I. R. 4 Eq. 1 ; *In re Denis's Trusts*, I. R. 10 Eq. 81 ; see *Donoghue v. Brooke*, I. R. 9 Eq. 489.

As to the meaning of legal issue by marriage in a will, see *Reed v. Braithwaite*, 11 Eq. 514.

Issue lawfully begotten.

The words issue lawfully begotten of a person will not confine issue to children. *Hayden v. Willshire*, 3 T. R. 372 ; *Evans v. Jones*, 2 Coll. 516.

d. If after a gift to issue the testator adds, "and if but one

then to such only child," issue will mean children. *In re Hopkins' Trusts*, 9 Ch. D. 131; *In re Biron*, 1 L. R. Ir. 258; see *Carter v. Bental*, 2 B. 551; *In re Meade's Trusts*, 7 L. R. Ir. 51.

e. In a gift to the issue of a tenant for life and their heirs, followed by a gift over if the tenant for life dies without children, issue means children. *Morgan v. Thomas*, 9 Q. B. D. 643.

Effect of gift over.

The fact that in one bequest after a gift for life the remainder is given to children, while in another gift in a later part of the will to the same tenant for life the remainder is given to issue, will not restrict the meaning of issue in the second gift. *Waldron v. Boulter*, 22 B. 284.

One remainder to children, another to issue.

The fact that in one part of the will there is an explanatory context, showing that the testator has used issue as equivalent to children will not be sufficient to give the word a restricted meaning in another part of the will where there is no explanatory context. *Head v. Randall*, 2 Y. & C. C. 231; see *Hedges v. Harpur*, 9 B. 479; *Re Corrie's Will*, 32 B. 426; *In re Warren's Trusts*, 26 Ch. D. 208.

Issue may have different meanings in different gifts.

But where in successive limitations of the same property to tenants for life and then to issue the word is in one case explained to mean children, it may have the same meaning in the other limitations. *Foster v. Wybrants*, 1 L. R. 11 Eq. 40.

Successive limitations of same property.

And if the testator has frequently used the word issue as equivalent to children, it will have that meaning in a limitation where there is no context to confine it. *Ridgeway v. Munkittrick*, 2 Dr. & War. 84; *Rhodes v. Rhodes*, 27 B. 413; *In re Harrison's Estate*, 3 L. R. Ir. 114.

The testator may explain what he meant by issue, for instance, by referring to a gift in favour of issue as being a gift in favour of children. *Macgregor v. Macgregor*, 1 D. F. & J. 63; *Baker v. Bayldon*, 31 B. 209.

Explanatory reference.

When the gift to issue is substitutional, the class of issue is not to be ascertained once for all at the death of the parent, but it will include persons subsequently born before the period of distribution. *In re Sibley's Trusts*, 5 Ch. D. 494; *In re Jones's*

At what time the class of issue is to be ascertained in a substitutional gift.

Chap. XXV. *Estate*; *Hume v. Lloyd*, 47 L. J. Ch. 775; overruling *Hobgen v. Neale*, 11 Eq. 48.

In the case of a gift in remainder to issue the same rule applies; that is to say, all the issue born at the testator's death and coming into being before the death of the tenant for life are admitted. *Surridge v. Clarkson*, 14 W. R. 979.

In the case
of cross-
remainders.

If the gift is to several for life, and then to their issue, with cross-remainders between them, the class of issue to take under the cross-remainders is fixed once for all at the death of the parent, who is tenant for life, and not at the death of the tenant for life dying without issue. *In re Ridge's Trusts*, 7 Ch. 665.

V. DESCENDANTS.

Descendants.

Descendants means *prima facie* all descendants living at the time of distribution, and apparently they take *per capita*. *Crossley v. Clare*, Amb. 397; 3 Sw. 320; *Butler v. Stratton*, 3 B. C. C. 367; *Re Flower*; *Matheson v. Goodwyn*, 62 L. T. 216.

But the expression "descendants or representatives" imports a distribution *per stirpes*. *Rowland v. Gorsuch*, 2 Cox, 187.

The word descendants requires a stronger explanatory context to confine it to children than the word issue. For instance, a direction that descendants are to take a parent's share would not limit the class to children. *Ralph v. Carrick*, 11 Ch. D. 873.

It would seem that the term descendants, when used as a word of purchase, and coupled with a gift to the ancestor, has a substitutional and representative sense, so that in a gift to several and their descendants, descendants would not take in competition with their ancestor. *Tucker v. Billing*, 2 Jur. N. S. 483; and perhaps *Jones v. Price*, 6 Sim. 255, may be supported on this principle. See, too, *Smith v. Pepper*, 27 B. 86; *Best v. Stonehewer*, 34 B. 66; 2 D. J. & S. 537.

A power to appoint to descendants does not authorise an appointment to the legal personal representative of a descendant though he may happen also to be a descendant. *In re Susanni's Trust*, 26 W. R. 93; 47 L. J. Ch. 65.

VI. RELATIONS.

The words "nearest relations" explain themselves, and no reference to the statute is necessary to determine the persons to take. *Smith v. Campbell*, 19 Ves. 400; *Brandon v. Brandon*, 3 Sw. 312; *Re Nash*; *Prall v. Bevan*, 71 L. T. 5. See *Goodinge v. Goodinge*, 1 Ves. Sen. 231; *Edge v. Salisbury*, Amb. 70.

Nearest relations means next of kin.

But the terms "relations" or "near relations" or "friends and relations" are of indefinite meaning, and the Courts, when compelled to determine the persons to take, have restricted them to relations capable of taking within the Statutes of Distribution, both as regards realty and personalty. *Whitehorn v. Harris*, 2 Ves. Sen. 527; *Walter v. Maunde*, 19 Ves. 424; *Thwaites v. Over*, 1 Taunt. 263; *Salisbury v. Denton*, 3 K. & J. 529; *Re Caplin's Will*, 2 Dr. & Sm. 527; 34 L. J. Ch. 578.

Relations.

The persons pointed out by the statute take *per capita* as joint tenants, and not in the proportions fixed by the statute. *Tiffin v. Longman*, 15 B. 275; *Eagles v. Le Breton*, 15 Eq. 148.

But they take in the proportion directed by the statute where the gift is to relations, share and share alike, as the law directs. *Fielden v. Ashworth*, 20 Eq. 410.

A power to select relations extends to relations generally. *Harding v. Glyn*, 1 Atk. 469; 5 Ves. 501.

Power to select.

But a power to distribute does not, and in default of appointment the Court will restrict the relations to those who can take under the statute. *Pope v. Whitcombe*, 3 Mer. 689; *Grant v. Lynam*, 4 Russ. 292; *Re Caplin's Will*, 2 Dr. & Sm. 527; *Lawlor v. Henderson*, 1 R. 10 Eq. 150; *In re Deakin*; *Starkey v. Eyres*, 63 L. J. Ch. 779; (1894) 3 Ch. 565.

Of course the testator may, by explanatory words, extend the word relations to persons not within the statute. *Devisme v. Mellish*, 5 Ves. 529; *Hibbert v. Hibbert*, 15 Eq. 372. See *Bennett v. Honywood*, Amb. 708.

As to the effect of a power to the wife to appoint to her relations where she was illegitimate and childless, see *In re Deakin*; *Starkey v. Eyres*, *supra*.

Chap. XXV.

When the class to take under a gift to relations is to be ascertained.

Prima facie the class of relations to take is to be ascertained at the death of the propositus.

Therefore, where the gift is immediate or in remainder to the testator's relations, after gifts to persons who are some of the next of kin, his next of kin at his death alone take. *Rayner v. Mowbray*, 3 B. C. C. 234; *Masters v. Hooper*, 4 B. C. C. 207; *Pearce v. Vincent*, 1 Cr. & M. 598; 2 M. & K. 800; 2 Sc. 347; 2 Bing. N. C. 328; 2 Kee. 230; see *Eagles v. Le Breton*, 15 Eq. 148, where there is a discrepancy between the head note and the judgment; see 42 L. J. Ch. 362. See *Stert v. Platel*, 5 Bing. N. C. 434.

Gift to such relations as survive the tenant for life.

If the gift is to such relations as survive the tenant for life the class is ascertained at the death of the ancestor, while those who die before the tenant for life are excluded. *Bishop v. Cappel*, 1 De G. & S. 411; *Re Nash*; *Prall v. Bevan*, 71 L. T. 5.

Where the tenant for life is sole next of kin at the date of the will and death.

The term relations, however, has not the same direct reference to the death of the propositus as heirs or next of kin, and therefore where there is a gift to A. either for life with remainder to her children, or to A. absolutely, followed by a gift over, if A. dies without issue, to the testator's relations, and A. is the sole next of kin at the date of the will and death, the class will be ascertained at A.'s death. *Marsh v. Marsh*, 1 B. C. C. 293; *Jones v. Colbeck*, 8 Ves. 38; *Lees v. Massey*, 3 D. F. & J. 113; see *post*, p. 286, *seq.*

And the testator may himself fix the time at which his relations are to be ascertained; for instance, by directing his relations to be advertised for at the death of a tenant for life, and giving the property to such of them as claim within two months after such advertisements. *Tiffin v. Longman*, 15 B. 275; see *Re Nash*; *Prall v. Bevan*, 71 L. T. 5, where the case is doubted.

When the class to take in default of appointment is to be ascertained.

Where there is a power to appoint to relations and no gift in default of appointment:

1. If there is no life interest, and the power is a general power to appoint to the testator's relations, it seems the class to take will be ascertained at the death of the testator and not when the power expires. *Cole v. Wade*, 16 Ves. 27; in which case, however, the actual point did not arise, since the next of

kin at the testator's death, and the time when the power expired, Chap. XXV. were the same.

2. If there is a life interest and the tenant for life has power to appoint to the testator's or his own relations, the class is to be ascertained at the death of the tenant for life, whether the power is to appoint by deed or will. *Harding v. Glyn*, 1 Atk. 468; *Birch v. Wade*, 3 V. & B. 198; see, too, *Brown v. Higgs*, 8 Ves. 561.

And it makes no difference whether the power is one of selection or distribution merely. *Pope v. Whitcombe*, 3 Mer. 689, as corrected by Lord St. Leonards on Powers, 662, and *Finch v. Hollingsworth*, 21 B. 112; *Caplin's Will*, 2 Dr. & Sm. 527; see, too, *A.-G. v. Doyley*, 4 Vin. Ab. 485, where the tenant for life and the donee of the power were different persons, and the class was ascertained at the death of the tenant for life.

VII. FAMILY, FRIENDS.

The word family may have a different meaning, according to Family. the context.

1. In the case of devises of land :—

"If land be devised to a stock or family or house it shall be understood of the heir principal of the house." *Counden v. Clarke*, Hob. 33. Devise of lands.

This will be the case where the word is used as a quasi-word of limitation, where, for instance, after a devise to a person, there is a direction that the property is to remain in his family. *Chapman's Case*, Dyer, 333; *Doe d. Chattaway v. Smith*, 5 Mau. & S. 126; *Griffiths v. Evan*, 5 B. 241.

A devise to A. and his family according to seniority, gives A. an estate tail. *Lucas v. Goldsmid*, 29 B. 657.

So, too, a devise of land to A. for life "in confidence that after her decease she will devise the property to my family," goes to the testator's heir-at-law upon A.'s death. *Wright v. Atkyns*, 17 Ves. 255; 19 Ves. 299.

Under a direction to secure property for the benefit of a person and his family the realty will be settled for life with successive remainders in tail, and the personalty will be settled Direction to secure for family.

Chap. XXV. for life with remainder to the children. *White v. Briggs*, 15 Sim. 17; 2 Ph. 583; *Woolmore v. Burrows*, 1 Sim. 512.

Bequest of
personalty to
family.

2. It is now settled that in a bequest of personalty or a mixed bequest of realty and personalty to the family of a person, the primary meaning of family is children. *Barnes v. Patch*, 8 Ves. 604; *Terry's Will*, 19 B. 580; *Wood v. Wood*, 3 Ha. 65; *Parkinson's Trust*, 1 Sim. N. S. 242; *Beales v. Crisford*, 13 Sim. 592; *Burt v. Hellyar*, 14 Eq. 160; *Pigg v. Clarke*, 3 Ch. D. 672; *In re Hutchinson & Tenant*, 8 Ch. D. 540; *In re Mulqueen*, 7 L. R. Ir. 127; *Re Muffett*; *Jones v. Mason*, 55 L. T. 671; see *Woods v. Woods*, 1 M. & Cr. 401.

It has been held that the word includes an illegitimate son. *Lambe v. Eames*, 10 Eq. 267; 6 Ch. 597; *Humble v. Bowman*, 47 L. J. Ch. 62.

3. There is more difficulty in ascertaining the meaning if the gift is to the A. family or to the family of A., where A. is merely a surname and there are several persons of that name. In such cases the Court will if possible ascertain who is meant, and the gift will go to his children. *Gregory v. Smith*, 9 Ha. 708; *Commissioners of Charitable Donations v. Deey*, 27 L. R. Ir. 289.

4. In order to give the word a different meaning there must be some special circumstances.

May mean
next of kin.

a. Thus, if there are no children, next of kin may take. *Re Maxton*, 4 Jur. N. S. 407.

b. So a gift to the family of an unmarried person would probably extend to all her relatives. *Snow v. Teed*, 9 Eq. 622.

In the widest
sense it may
include a
husband or
wife.

c. In some cases on the context family has been held to mean those of a man's household, thus including a wife or husband. *Macleroth v. Bacon*, 5 Ves. 158; *Blackwell v. Bull*, 1 Kee. 176.

When it
includes all
descendants.

d. Family has been held to include all descendants in existence at the period of distribution; but such a construction would not be adopted without a strong context. *Williams v. Williams*, 1 Sim. N. S. 358.

Power to
appoint to
family.

e. It would seem that a power to appoint to a person's family would be limited to his children if there are any. *In re*

Hutchinson & Tenant, 8 Ch. D. 540; see *Sinnott v. Walsh*, 5 Chap. XXV.
L. R. Ir. 27.

If there are no children the donee of the power may select relations not within the degree of next-of-kin. *Grant v. Lynam*, 4 Russ. 292.

If the power is not exercised the statutory next-of-kin are entitled. *Cruwys v. Colman*, 9 Ves. 319.

5. Where it is clear that the testator has used the word family in a wider sense than any of those here mentioned, but it is uncertain who were meant to be included, the gift will be void for uncertainty. *Yeap Cheah Neo v. Ong Ching Neo*, L. R. 6 P. C. 381; see *Robinson v. Waddelow*, 8 Sim. 134; *In re Cullimore's Trusts*, 27 L. R. Ir. 18.

When family is construed children, a simple gift to the families of A. and B. goes *per capita* in joint tenancy. *Gregory v. Smith*, 9 Ha. 708. Whether a gift to several families goes *per capita* or *per stirpes* among them.

So, too, a gift to be divided between the families of A. and B. goes to all the children of A. and B. *per capita* as tenants in common. *Barnes v. Patch*, 8 Ves. 604; see, however, *Alexander v. Douglas*, Rom. N. of C. 93.

Under a direction that after the death of the testator's wife, to whom a life interest in lands was given, the lands should revert to the testator's friends, the heir at law was held entitled. *Coogan v. Hayden*, 4 L. R. Ir. 585. Friends.

CHAPTER XXVI.

GIFTS TO HEIRS, NEXT OF KIN, REPRESENTATIVES, AND
EXECUTORS.**Chap. XXVI.**

Devise of
Borough
English and
Gavelkind
lands to the
heir.

WHERE Borough English or gavelkind lands are devised with other lands to the testator's heir, the common law heir is entitled. *Davis v. Kirk*, 2 K. & J. 391; *Thorp v. Owen*, 2 Sm. & G. 90; *Buchanan v. Harrison*, 1 J. & H. 662; *Sladen v. Sladen*, 2 J. & H. 369.

So where Borough English lands alone are devised to A. for life, with remainder to her sons and daughters and their heirs, and if A. dies without having such heirs, to the testator's sons and daughters then living and the heirs of those who may be deceased, the common law heir takes under the ultimate gift. *Polley v. Polley*, 31 B. 363.

In the same way a devise of gavelkind lands alone to the testator's right heirs goes to the common law heir. *Garland v. Beverley*, 9 Ch. D. 213.

In what cases
the word heir
refers to a
persona
designata.

The rule is that "*nemo est hæres viventis*," and therefore a devise to the heirs of a living person is contingent, unless the term heirs is so qualified by express words or by the general intention of the will as to show that the testator meant by heir the heir apparent or presumptive or some other person, who will then take as *persona designata*.

This will be the case if the testator speaks of the heirs of the body of B. now living. *Burchett v. Durdant*, 2 Vent. 311; Carth. 154; see *Chambers v. Taylor*, 2 M. & Cr. 376.

Or the intention of the testator to use the term as designating a person may be gathered from the whole will; if, for instance, the so-called heir is directed to pay annuities to certain persons during whose life he cannot be strictly heir. *Darbyson d.*

Long v. Beaumont, 1 P. W. 229; 3 B. P. C. 60; *Goodright v. White*, 2 W. Bl. 1010; *Winter v. Perratt*, 9 Cl. & F. 606. Chap. XXVI.

A devise to the heirs and assigns of "A., as if she had continued sole and unmarried," is a gift to the person filling the character as *persona designata*. *Brookman v. Smith*, L. R. 6 Ex. 291; *ib.* 7 Ex. 271; *Dormer v. Phillips*, 4 D. M. & G. 855; 3 Dr. 39; *Fearne*, C. R. 209—212.

The persons, if more than one, who constitute the heir take as joint tenants. *Swaine v. Burton*, 15 Ves. 365; *Mounsey v. Blamire*, 4 Russ. 384; *Berens v. Fellowes*, 56 L. T. 391; see also *Moore v. Simkin*, 31 Ch. D. 95. Co-heirs take as joint tenants.

The appointment or acknowledgment of a person as heir, though he may not be the real heir, is sufficient to carry to him the testator's real estate. *Parker v. Nickson*, 1 D. J. & S. 177; 11 W. R. 533; 32 L. J. Ch. 397. Acknowledgment of a person as heir.

A devise to the right heirs male, or to the right heirs of a particular name, will go only to the very heir, who must be a male or of that name. *Ashenhurst's Case*, Hob. 34; *cit. Counden v. Clarke*, Moore, 860, pl. 1181; Hob. 29; *Wrightson v. Macaulay*, 14 M. & W. 214; *Thorpe v. Thorpe*, 32 L. J. Ex. 79; see Co. Lit. 24b, note by Hargrave. Devise to the heir of a particular name or to heirs male.

If the devise is to the right heirs exclusive of A., who is the right heir, the devise fails. *Goodtitle d. Bailey v. Pugh*, *Fearne*, Cont. Rem. 573; 2 Mer. 348.

The rule does not, however, apply to heirs of the body, whether taking by descent or purchase. *Wills v. Palmer*, 5 Burr. 2617; 2 W. Bl. 687; *Evans d. Weston v. Burtenshaw*, Co. Lit. 164a, n. (2). Heirs of the body.

An heir male taking by inheritance must trace his descent entirely through males. Co. Lit. 25a. Whether the heir male taking by purchase must trace his descent through males.

It is said by Jarman, ii. p. 912, that this does not apply to a gift to the heir male or female by purchase, citing Hob. 31; Co. Lit. 25b. At any rate it is clear that if the word lineal be added the heir must trace his descent through males. *Oddie v. Woodford*, 3 M. & Cr. 584; *Bernal v. Bernal*, 3 M. & Cr. 559; and see *Doe d. Angell v. Angell*, 9 Q. B. 328; *Thellusson v. Rendlesham*, 7 H. L. 429.

Chap. XXVI.

It appears, however, to be concluded by authority that, even in the absence of the word lineal, the heir male taking by purchase must claim through males. *Lywood v. Kimber*, 29 B. 38. See *per* Lord St. Leonards, 7 H. L. 512; and see *Doe d. Winter v. Perratt*, 3 M. & Sc. 594.

Heir *ex parte*
maternal.

Under a devise to the heir *ex parte maternal* a person who is also heir *ex parte paternal* may take. *Rawlinson v. Wase*, 9 Ha. 673; *In re Willomier's Trusts*, 16 Ir. Ch. 389.

RULE IN MANDEVILLE'S CASE, CO. LIT. 26B.; FEARNE, 80.

Rule in
Mandeville's
case.

"Where an estate is limited to the heirs special of a particular ancestor, without any estate of freehold limited to the ancestor (either expressly or by implication), it is impossible to effectuate the expressed will of the donor and to make the estate pass through the whole series of the special heirs designated, except by regarding the limitation as if it were an estate tail, which had originally vested in and descended from the ancestor himself, and yet the first taker must take as purchaser, because no estate did in fact vest in or descend from the ancestor." *Vernon v. Wright*, 2 Drew. 439; 7 H. L. 35.

The result is the creation of a *quasi* entail, partaking of the opposite qualities of purchase and descent. Thus, where the limitation was to Roberge and the heirs of the body of her late husband John de Mandeville by her, where John de Mandeville had left a son and daughter, it was held that the daughter took on the death of the son *per formam doni*, as the person, who would have been entitled, if the estate had descended from the ancestor. *Mandeville's Case*, Co. Lit. 26b.

The rule in Mandeville's case applies equally where the limitation is to the heirs of the body of the testator. *Allgood v. Blake*, L. R. 7 Ex. 339; *ib.* 8 Ex. 160.

It has been adopted where the term issue was used. *Whitelock v. Heddon*, 1 B. & P. 243.

But it will not be extended to a devise to the heirs of the body of a deceased person, excluding certain lines of descent, which would comprehend the real heirs of the body; nor does it apply to a devise to the right heirs male of a person, though a

devise to A. and his heirs male gives A. an estate tail. *Allgood v. Blake, supra*; *Ashenhurst's Case*, Hob. 34; *Baker v. Wall*, 1 Ld. Raym. 185; *Doe d. Lindsey v. Colyear*, 11 East, 548. Chap. XXVI.

And it does not apply where the limitation is to heirs general. *Moore v. Simkin*, 31 Ch. D. 95.

Heirs of the body, however, used as a term of purchase, may mean children if the devise is to them as their parent shall appoint, or if they are to take equally among them as tenants in common. *Jordan v. Adams*, 9 C. B. N. S. 483; *Right v. Creber*, 5 B. & Cr. 866; in which case the estate of the ancestor being equitable did not coalesce with the limitation to the heirs. In what cases heirs of the body means children.

ASSIGNS.

As a rule the words "and assigns," following the word heirs, have no operation; "they have no conveyancing virtue at all, but are merely declaratory of that power of alienation which the purchaser would have had without them." Wms. R. P. 142; *Brookman v. Smith*, L. R. 6 Ex. 291. Assigns.

It has, however, been held that a legal limitation to the heirs and assigns of a person, who had a prior equitable life estate, gave that person a general power of appointment over the property. *Quested v. Michell*, 24 L. J. Ch. 722. See, too, *Tupner v. Marlott*, Willes, 177; and *A.-G. v. Vigor*, 8 Ves. 256, 291; but it is unlikely that this construction will be extended.

The effect, however, of a gift to A. or his heirs or assigns, is to give the absolute interest to A. *Wilton's Estate*, 8 D. M. & G. 173; *Hopkins' Trust*, 2 H. & M. 411. See *post*, p. 291.

BEQUESTS OF PERSONALTY TO HEIRS.

1. A bequest of personalty to the right heirs, or to the heirs at law, or the next heir of an individual, *prima facie* goes to such heir as *persona designata*, whether the bequest be to the heirs of the testator or of a stranger. *Mounsey v. Blamire*, 4 Russ. 384; *Hamilton v. Mills*, 29 B. 193; *De Beauvoir v. De Beauvoir*, 3 H. L. 524; *Re Rootes*, 1 Dr. & Sm. 228; *Southgate v. Clinch*, 27 L. J. Ch. 651; 4 Jur. N. S. 428. Bequests of personalty to heirs.

Chap. XXVI.

The rule applies, *à fortiori*, to a mixed fund. *De Beauvoir v. De Beauvoir*, 3 H. L. 524; *Boydell v. Golightly*, 14 Sim. 327; *Todhunter v. Thompson*, 26 W. R. 883.

A. for life,
remainder to
heirs.

2. In the same way, if the gift is to A. for life with remainder to his heirs, the heir, in the strict sense, is entitled. *In bonis Dixon*, 4 P. D. 81; *Smith v. Butcher*, 10 Ch. D. 113; disapproving *Mounsey v. Blamire*, 4 Russ. 384. The cases of *Evans v. Salt*, 6 B. 266; *Low v. Smith*, 25 L. J. Ch. 503; 2 Jur. N. S. 344; *Re Peppitt's Estate*; *Chester v. Phillips*, 36 L. T. 500, must be considered overruled, unless they can be supported on the special context in each case.

In what cases
heirs means
next of kin.

3. But the word heirs may be controlled by the context, as in *Gamboa's Trust*, 4 K. & J. 757, where a bequest to "the heirs of my late partner for losses sustained during the time that the business of the house was under my sole control," went to the next of kin under the statute; and in *In re Newton's Trusts*, 4 Eq. 171, where the bequest to "the heirs and assigns of my deceased sister" was shown to be *quasi*-substitutional by other limitations to the testator's living brothers and sisters and their heirs and assigns; and see *In re Stevens' Trusts*, 15 Eq. 110, as to which case *quære*.

Where the intention is to give A. the absolute interest, the word heirs has been held equivalent to executors and administrators. *Powell v. Boggis*, 35 B. 535, where the gift was to A. for life, then to her heirs as she shall give it by will, and if she dies without a will to her right heirs.

And, where the testator directs a division amongst the several heirs of tenants for life, who are related to each other, so that heirs cannot mean next of kin, heirs will mean children. *Bull v. Comberbach*, 25 B. 540; see *Roberts v. Edwards*, 33 B. 259.

Substitutional
gift to heirs.

4. In a gift to A. or his heirs, heirs means the persons entitled under the statute. *Vaux v. Henderson*, 1 J. & W. 388; *Gittings v. M'Dermott*, 2 M. & K. 69; *Jacobs v. Jacobs*, 16 B. 557; *Doody v. Higgins*, 9 Ha. App. 32; 2 K. & J. 729; *In re Craven*, 23 B. 333; *Powell v. Boggis*, 35 B. 535; *Parsons v. Parsons*, 8 Eq. 260; *Neilson v. Monro*, 27 W. R. 936; *In re Stannard*; *Stannard v. Burt*, 52 L. J. Ch. 354.

If real and personal estate are given together to persons or their heirs, but the realty is not converted, the realty goes to the heir and the personalty to the statutory next of kin. *Wingfield v. Wingfield*, 9 Ch. D. 658; *Keay v. Boulton*, 25 Ch. D. 212. Chap. XXVI.

In a bequest to children or their heirs, followed by a gift over if all the children die without issue, the word heirs has been held to mean issue. *Speakman v. Speakman*, 8 Ha. 180; and see *Roberts v. Edwards*, 12 W. R. 33.

In a bequest to A. or the heirs of his body, heirs of the body means such of the persons entitled under the statute as may be descendants of A. *Pattenden v. Hobson*, 17 Jur. 406; 22 L. J. Ch. 697. Heirs of the body.

A widow is included in the persons entitled under the statute, and the statute fixes not only the persons but the proportions in which they take. *In re Steevens' Trusts*, 15 Eq. 110; *Jacobs v. Jacobs*, *supra*; *Doody v. Higgins*, *supra*. The statute fixes the proportions as well as the persons.

A bequest of personalty to "the heirs or next of kin of A." has been construed as a gift to next of kin. *In re Thompson's Trusts*, 9 Ch. D. 607; see p. 283.

NEXT OF KIN.

The words next of kin, without more, mean the nearest blood relations of the propositus in an ascending and descending line, and they take as joint tenants. *Withy v. Mangles*, 10 Cl. & F. 215; *Lucas v. Brandreth*, 28 B. 274; *Avison v. Simpson*, Johns. 43; *Halton v. Foster*, L. R. 3 Ch. 505. Gifts to next of kin.

The same meaning has been given to the words "legal or next of kin." *Harris v. Newton*, 46 L. J. Ch. 268; 25 W. R. 228.

Those of the half blood are equally entitled with those of the whole blood. *Collingwood v. Pace*, 1 Vent. 424; *Brown v. Wood*, Alleyn, 36; *Brigg v. Brigg*, 33 W. R. 454; see 2 Wms. Exors. 981.

But a selective power to appoint to next of kin will authorise an appointment to statutory next of kin. *Snow v. Teed*, 9 Eq. 622. Gift under power.

Under a gift to next of kin *ex parte maternâ*, next of kin Next of kin

Chap. XXVI.*ex parte
maternal.*

ex parte paternal, who happen to be also next of kin *ex parte maternal*, will not be excluded, except by express words. *Gundry v. Pinniger*, 14 B. 94; 1 D. M. & G. 502; *Say v. Creed*, 5 Ha. 580.

The effect of
a reference to
the statute or
intestacy.

If there is an express reference to the statute or intestacy, all kindred entitled under the statute, including those who take by representation under the statute, will come in. *Bullock v. Downes*, 9 H. L. 1; *Nichols v. Haviland*, 1 K. & J. 504.

Neither the wife nor the husband take as *next of kin* under the statute. *Garrick v. Lord Camden*, 14 Ves. 372; *Kilner v. Leech*, 10 B. 362; *In re Fitzgerald*, 58 L. J. Ch. 662; 61 L. T. 221; 37 W. R. 552.

And a gift to persons, entitled as next of kin or otherwise under the statute, will not include the husband. *Milne v. Gilbert*, 2 D. M. & G. 715; 5 D. M. & G. 510.

If a husband has been expressly excluded in a gift to next of kin under the statute, a widow will be admitted under a subsequent gift to next of kin by statute where there is no such exclusion. *In re Collins' Trusts*, W. N. 1877, 87.

If only an intention is declared of leaving property to next of kin according to the statute, which is not carried out, the property goes as on an intestacy, and a widow would therefore be admitted. *Ash v. Ash*, 33 B. 187.

What will
exclude one
of the next
of kin from a
gift to next of
kin.

A person is not excluded from taking property under a gift to next of kin by the fact, that a life interest in the property is expressly given to him. *Gorbell v. Davison*, 18 B. 556.

But if the gift is to the "other the next of kin," one of the next of kin to whom an interest is expressly given by the will will be excluded. *Cooper v. Denison*, 13 Sim. 290.

Whether the
statute
regulates the
nature of the
interest as
well as the
persons to
take.

If there is a reference to the statute, the statute regulates the nature of the interest, as well as the persons, who are to take under it. *Bullock v. Downes*, 9 H. L. 1; *Ranking's Settlement Trusts*, 6 Eq. 601.

The above proposition seems to be justified by the opinions expressed in *Bullock v. Downes*, and would probably be now adopted. However, the cases go to this:

1. Where there is a reference to intestacy, as well as to the statute, the statute fixes the proportions as well as the persons.

Bullock v. Downes, *supra*; *Martin v. Glover*, 1 Coll. 270; Chap. XXVI.
Jenkins v. Gower, 2 Coll. 537.

2. So, where the gift is to persons "entitled under," or "under and according to" the statute. *Horn v. Coleman*, 1 Sm. & G. 169; *Ranking's Settlement*, *supra*.

3. If the gift is merely to persons according to the statute the better opinion seems to be, that the same result would follow. *Mattison v. Tanfield*, 3 B. 131; *Lewis v. Morris*, 19 B. 34. On the other hand, the contrary was held in *In re Greenwood's Trusts*, 3 Giff. 390.

4. Words importing or directing a tenancy in common will not prevent the statute from fixing the proportions. *Mattison v. Tanfield*, *supra*; *Lewis v. Morris*, *supra*. *Richardson v. Richardson*, 14 Sim. 526, must be considered overruled; see *Bullock v. Downes*.

5. It would seem, that a gift *equally* among the persons entitled under the statute, would prevent the statute from fixing the proportions; see *Phillips v. Garth*, 3 B. C. C. 69.

But if there are words importing that the distribution is to be according to the statute, the word *equally* will be rejected. *Holloway v. Radcliffe*, 23 B. 163; see *Fielden v. Ashworth*, 20 Eq. 410.

A devise of land to the nearest of kin by way of heirship goes to the heir. *Williams v. Ashton*, 1 J. & H. 115. Nearest of kin by way of heirship.

A gift to "next of kin or heir at law" would probably go according to the nature of the property. *Lowndes v. Stone*, 4 Ves. 649; see *In re Thompson's Trusts*, 9 Ch. D. 607.

In *Boys v. Bradley*, 10 Ha. 389; 4 D. M. & G. 58; 5 H. L. 873, "next of kin in the male line in preference to the female line," was held to mean next of kin *ex parte paternâ*. Next of kin in the male line.

A devise of land to the next male kin goes to all the nearest of kin being males living at the testator's death. *In re Chapman*; *Ellick v. Cox*, 32 W. R. 424.

A devise of land to the "next" or "nearest" of a particular class of relations goes to the eldest of the class. *Perriman v. Pearce*, Co. Lit. 10b., n. 2; *Power v. Quealy*, 2 L. R. Ir. 227; 4 *ib.* 20, where the devise was to the "nearest, and most deserving male cousin, and a regular Power of the family." Devise to "nearest" of a class.

Chap. XXVI.

On the other hand, in a gift of real and personal estate together to the nearest relation of a particular name the word relation has been held to be *nomen collectivum*, and to include all the relations of the same degree. *Pyot v. Pyot*, 1 Ves. Sen. 335 ; Belt. 169.

Next of kin
of a particular
name.

It appears to be clear that a devise of land to "next of kin of a particular name" goes only to next of kin who are by birth entitled to the name, and that a daughter of that name who at the testator's death has changed her name by marriage would be excluded. *Leigh v. Leigh*, 15 Ves. 100 ; *Jobson's Case*, Cro. El. 576 ; see *Bon v. Smith*, Cro. El. 532.

But it may appear from the will that the assumption of the name by royal licence is intended to be sufficient. *In re Roberts ; Repington v. Roberts-Gawen*, 19 Ch. D. 520.

Possibly, in the case of personalty, or of real and personal estate given together, a reference to a particular name may be more readily understood as referring to the stock or family.

At any rate it may be so understood if there is an explanatory context.

Thus, "nearest relation of the name of the Pyots" has been held to refer to the stock of the Pyots, so that change of name by marriage was immaterial. *Pyot v. Pyot*, 1 Ves. Sen. 335.

A similar construction was put upon "next of kin of the surname of Crump." *Carpenter v. Bott*, 15 Sim. 606 ; see, too, *Mortimer v. Hartley*, 6 Ex. 47.

Whether the person, who is to take under the description of a particular name, must satisfy both parts of the description is uncertain : see *Doe v. Plumptre*, 3 B. & Ald. 474, and the remarks of the Vice-Chancellor on that case in *Carpenter v. Bott*, 15 Sim. 606.

Gift to next
of kin ex-
clusive of A.,
who is sole
next of kin.

A gift to next of kin, to be ascertained at a particular time exclusive of A., who is the sole next of kin, goes to the persons who would have been next of kin if A. also had been dead. *White v. Springett*, 4 Ch. 300.

The persons to take will be ascertained in the same way, if the gift is to next of kin by statute simply exclusive of A., who

happens to be sole next of kin by statute. *Re Taylor; Taylor v. Ley*, 45 L. T. 210; 52 L. T. 839. Chap. XXVI.

Under a limitation to the statutory next of kin of B., exclusive of A. and his representatives, it was held that the daughters of A., who were among the statutory next of kin of B., as representing A., were excluded. *Lindsay v. Ellicott*, 46 L. J. Ch. 878.

The testator may show, that he meant by next of kin the children of a tenant for life, as, where the gift was to a daughter for life and then to the testatrix's next of kin, to be vested interests from the testatrix's death, "except as to any child afterwards born of the daughter." *Bird v. Wood*, 2 S. & St. 400; see 2 M. & K. 86, 89.

Next of kin explained by the context.

In a gift to the next of kin of A., or even to the person entitled under the Statutes of Distribution, as if she had died intestate and unmarried, unmarried will be construed as equivalent to "without leaving a husband," since otherwise children would be excluded. *Day v. Barnard*, 1 Dr. & S. 351; *Sanders' Trusts*, 3 K. & J. 152; *Norman's Trusts*, 3 D. M. & G. 965; *Maugham v. Vincent*, 9 L. J. Ch. 329; *Clarke v. Colls*, 9 H. L. 601.

Gift to next of kin of A. as if she had died unmarried.

Where the testator, a widower, expressly excluded a granddaughter from a bequest in favour of his "next of kin as if he had died unmarried," it was held that unmarried meant wifeless. *Carveth v. Heiron*, W. N. 1879, 145.

In a marriage settlement a limitation in favour of the next of kin of the wife as if she had died "without having been married," where there was a declaration that a named illegitimate daughter should, for the purposes of the trust, be deemed to be a lawful child, has been held to mean as if the wife had died without having been married to her then intended husband. *Wilson v. Atkinson*, 4 D. J. & S. 455.

Without having been married.

A similar construction has been adopted, where there was no explanatory context, and the words have even been held to be equivalent to "without leaving a husband." *Upton v. Brown*, 12 Ch. D. 872; *In re Ball's Trusts*, 11 Ch. D. 270; *Stoddart v. Saville*, (1894) 1 Ch. 480.

It seems, however, that such clear words as "without ever having been married" must be construed in their natural sense,

Chap. XXVI. unless there is a strong context. *Emmins v. Bradford*, 13 Ch. D. 493; *Hardman v. Maffett*, 13 L. R. Ir. 499; *Re Watson's Trusts*, 55 L. T. 316.

At what time
next of kin
and heirs
are to be
ascertained.

The terms next of kin and heirs have a direct reference to the death of the ancestor, and therefore next of kin and heirs are to be ascertained at the death of the ancestor, and, where there is in addition a reference to the statute or to intestacy, this rule is almost without exception.

A mixed fund
is no excep-
tion to the
ordinary rule.

The same rules apply to realty, personalty, and to a mixed fund. *Cusack v. Rood*, 24 W. R. 391.

1. Thus the rule applies, whether the bequest to next of kin is immediate or preceded by a life interest or contingent. *Moss v. Dunlop*, Joh. 490; *Bird v. Luckie*, 8 Ha. 301.

2. And, if the gift is to next of kin living at a particular time, it will go to such of the next of kin at the testator's death as are living at that time. *Spink v. Lewis*, 3 B. C. C. 355; *Re Nash*; *Prall v. Bevan*, 71 L. T. 5.

3. If there is a devise to A. for life with remainder to his eldest son for life, with a direction on his death to convey the estate to the heir male of A., the eldest son of A. is entitled on A.'s death to have the fee conveyed to him. *In re Grayson*, 48 L. J. Ch. 354.

Similarly, if personalty is given to A. for life, and then to the testator's next of kin, though A. may be one of the next of kin, or even the only next of kin, at the testator's death, or even the only next of kin at the date of the will as well as at the testator's death, the class will nevertheless be ascertained at the testator's death. *Doe v. Lawson*, 3 East, 278; *Ware v. Rowland*, 2 Ph. 635; *Holloway v. Holloway*, 5 Ves. 399; *Barker's Trust*, 1 Sm. & G. 118; *Gorbell v. Davison*, 18 B. 556; *Starr v. Newberry*, 23 B. 436; *Re Ford*; *Patten v. Sparks*, 72 L. T. 5.

The mere exception from the class of next of kin of certain persons, who could only be members of the class on the supposition of the death of the tenant for life, will not alter the time for fixing the class. *Lee v. Lee*, 1 Dr. & Sm. 85; see *Cooper v. Denison*, 13 Sim. 290.

4. The same rules apply, where the gift to the next of kin is not by way of remainder, but by way of executory limitation.

Thus, in a gift to A. for life, where A. is sole next of kin at the date of the will and death, and then to her children, or to A. absolutely, and if she dies without children, or under twenty-one, to the testator's next of kin, the next of kin are ascertained at the testator's death. *Lang's Will*, 9 W. R. 589; *Murphy v. Donegan*, 3 J. & Lat. 534; *Baker v. Gibson*, 12 B. 101; *Harrison v. Harrison*, 28 B. 21; *Michell v. Bridges*, 13 W. R. 200; see *Urquhart v. Urquhart*, 13 Sim. 613; *Minter v. Wraith*, 14 Sim. 549; *Hunter v. Tedlie*, 7 L. R. Ir. 448.

Chap. XXVI.

Executory
gift to next of
kin.

The case is, however, different, if the gift is not to next of kin, but to the "nearest of kin of my own family," or to relations. *Clapton v. Bulmer*, 5 M. & Cr. 108; see pp. 272, 273.

In the former case the intention is to let the property go as the law would give it, in the latter to make a complete disposition by the will to a particular class contemplated by the testator, though, owing to the vagueness of the description, the Courts may be compelled to have recourse to the statute, that the gift may not be void for uncertainty.

5. Even if the gift be to a class of persons, who must be the testator's next of kin if any survive him, and if they die without issue to his next of kin, the next of kin are ascertained at his death. *Seifferth v. Badham*, 9 B. 372.

6. The testator may of course direct the class of next of kin to be ascertained at any time or in any manner he chooses. *Pinder v. Pinder*, 28 B. 44; *White v. Springett*, 4 Ch. 300.

The mere use of words of futurity will not alter the ordinary rule; for instance, if the bequest be to A. for life and after his death for such persons, as shall be my next of kin. *Holloway v. Holloway*, 5 Ves. 399; *Doe v. Lawson*, 3 East, 278; *Rayner v. Mowbray*, 3 B. C. C. 234.

Effect of
words of
futurity in
ascertaining
the class.

But, if the gift is, after the decease of the tenant for life, to such persons as shall *then* be my next of kin, the word "*then*" must refer to the death of tenant for life. *Long v. Blackall*, 3 Ves. 486; *Wharton v. Barker*, 4 K. & J. 483; see *Clowes v. Hilliard*, 4 Ch. D. 413; *In re Morley's Trusts*, 25 W. R. 825; *Valentine v. Fitzsimons*, (1894) 1 I. R. 93; and in such a case the class is to be ascertained as if the testator had lived up to

Chap. XXVI. and died at the time referred to. *Sturge v. Great Western Railway Co.*, 19 Ch. D. 444.

But it must be clear, that the word "then" is used temporally and not as equivalent to thereupon, and that it may not be referred to other words pointing to the testator's death, as will be the case if the gift is, for instance, "to such persons as would by virtue of the statutes for the distribution of intestates' estates have become and been then entitled thereto in case I had died intestate." *Bullock v. Downes*, 9 H. L. 1; *Doe v. Lawson*, 3 East, 278; *Cable v. Cable*, 16 B. 507; *Wheeler v. Adams*, 17 B. 417; *Fletcher v. Fletcher*, 3 D. F. & J. 775; *Day v. Day*, 1 R. 4 Eq. 385; *Mortimore v. Mortimore*, 4 App. C. 448.

Where the gift is to the next of kin of a wife as if she had survived her husband and died intestate, the cases, which arise mainly on marriage settlements, are conflicting.

The view that the class is to be ascertained on the husband's death is supported by *Pinder v. Pinder*, 28 B. 44; *Chalmers v. North*, 28 B. 175; *Clarke v. Hayne*, 42 Ch. D. 529; *Re King's Settlement*; *Gibson v. Wright*, 60 L. T. 745. The view that the class is to be ascertained when the wife actually died is supported by *Druitt v. Seaward*, 31 Ch. D. 234; *Re Bradley*; *Brown v. Cottrell*, 58 L. T. 631.

Gifts to
next of kin
of deceased
person.

7. By analogy to the case of gifts to the testator's own next of kin, the persons to take under gifts to the next of kin of a deceased person are those who are at the testator's death such next of kin. *Philps v. Evans*, 4 De G. & S. 188; *Wharton v. Barker*, 4 K. & J. 483.

The rule is the same if the gift is to the next of kin of a person who is not dead at the date of the will but who dies before the testator's death. *Vaux v. Henderson*, 1 J. & W. 388, n.; *In re Gryll's Trusts*, 6 Eq. 589; *In re Philps' Will*, 7 Eq. 151.

Exceptions to
the rule.

The circumstance that the tenant for life under the will is the sole next of kin at the date of the will so that if the ordinary rule applies he must take if he survives the testator, would probably not alone be sufficient to alter the rule. *Wharton v. Barker*, 4 K. & J. 483.

But if the gift is by a testatrix to such persons as would have become entitled to her husband's personal estate had he died

intestate, and without leaving a widow, the next of kin must be ascertained at the husband's death, and if one of them dies before the testatrix there is a lapse as regards his share. *In re Rees*; *Williams v. Davis*, 44 Ch. D. 484; see *In re Ham's Trust*, 2 Sim. N. S. 106. Chap. XXVI.

8. If the gift is to the next of kin of a person, who survives the testator, the class is ascertained at the death of that person. *Gundry v. Pinniger*, 1 De G. M. & G. 502; *Jacobs v. Jacobs*, 16 B. 557; *Markham v. Ivatt*, 20 B. 579. Next of kin of a living person.

REPRESENTATIVES.

The words representatives, legal representatives, personal representatives, or legal personal representatives, must, in the absence of other controlling words, be taken to mean persons claiming as executors or administrators. *Crawford's Trust*, 2 Dr. 230; *Hinchcliffe v. Westwood*, 2 De G. & Sm. 216; *Dixon v. Dixon*, 24 B. 129; *Re Turner*, 2 Dr. & Sm. 501; *Smith v. Barneby*, 2 Coll. 728; *Wyndham's Trust*, L. R. 1 Eq. 290; *Alger v. Parrott*, 3 Eq. 328; *Best's Settlement*, 18 Eq. 686; *In re Ware*; *Cumberlege v. Cumberlege-Ware*, 45 Ch. D. 269. Gift to representatives.

If, however, there is an indication of intention that the representatives are to take beneficially and not in any fiduciary capacity, the words can hardly be referred to executors or administrators, and they will generally mean statutory next of kin, including a widow, but not a husband. *Cotton v. Cotton*, 2 B. 67; *Smith v. Palmer*, 7 Ha. 225; *Holloway v. Radcliffe*, 23 B. 163; *King v. Cleaveland*, 26 B. 166; 4 De G. & J. 477; *In re Horner*; *Eagleton v. Horner*, 37 Ch. D. 710. In what cases representatives mean next of kin.

It would seem that by analogy to the case of heirs, the statute would fix the proportions as well as the persons, and that *Walker v. Marquis of Camden*, 16 Sim. 329, would not now be followed.

1. If the gift is substitutional, as, for instance, to A. or his legal representatives, or even to A., and if he dies before me to his representatives, there is an *à priori* improbability that the testator meant to benefit the estate of the legatee if he died in the testator's lifetime, while the legatee himself could derive no Substitutional gift.

Chap. XXVI.

benefit from the legacy unless he survived the testator, and therefore representatives will be read as equivalent to statutory next of kin. *Bridge v. Abbott*, 3 B. C. C. 224; *Cotton v. Cotton*, 2 B. 67; *Re Thompson*; *Machell v. Newman*, 55 L. T. 85; see *Hewetson v. Todhunter*, 22 L. J. Ch. 76.

The next of kin to take are those who would have been next of kin according to the statutes if the legatee had died at the time of the death of the testator. *Bridge v. Abbott*, 3 B. C. C. 224; *Re Thompson*; *Machell v. Newman*, 55 L. T. 85.

If the gift is to several related persons, or their respective representatives, representatives will mean descendants. *Styth v. Monro*, 6 Sim. 49. See *Horsepool v. Watson*, 3 Ves. 383; *Atherton v. Crowther*, 19 B. 448; *In re Booth*; *Fytton v. Booth*, W. N. 1877, 129.

Prior life
estate.

2. Where there is a prior life estate the reasons for construing "legal representatives" as next of kin do not apply.

The substitutional words may be considered as inserted merely *ex abundanti cautela*, to provide for the death of the legatee in the lifetime of the tenant for life. *In re Crawford*, 2 Dr. 230, 242; *Re Henderson*, 28 B. 656; *Hinchcliffe v. Westwood*, 2 De G. & S. 216; *Chapman v. Chapman*, 38 B. 556; *Re Turner*, 2 Dr. & Sm. 501.

The same is the case where there is a direct gift to A. or his personal representatives, but the time of payment is postponed, or a gift to A., and if he dies before the whole is expended, to his representatives. *Thompson v. Whitelock*, 4 De G. & J. 490; *Dixon v. Dixon*, 24 B. 129.

Words of
distribution.

3. If there are words of distribution, such as "to and amongst," or "share and share alike," and similar expressions, showing that the "representatives" are to take beneficially, the legacy will go to the statutory next of kin. *King v. Cleaveland*, 4 De G. & J. 477; *Baines v. Ottey*, 1 M. & K. 465; *Smith v. Palmer*, 7 Ha. 225.

This, however, does not apply where the gift being to the representatives of several persons who take life interests, the words of distribution can be referred to the *stirpes*. *Wing v. Wing*, 24 W. R. 878.

Where both

4. If the words executors and administrators have been used

in other parts of the will, this is an argument to show that representatives must mean something else. *Jennings v. Gallimore*, 3 Ves. 146; *King v. Cleaveland*, 4 De G. & J. 477; *Nicholson v. Wilson*, 14 Sim. 549; *Walker v. Marquis of Camden*, 16 Sim. 329; *Briggs v. Upton*, 7 Ch. 376. Chap. XXVI.
the words
executors and
representa-
tives occur.

5. Where there is a direction to pay to personal representatives, the fact that an executor is appointed, would be a strong argument in favour of next of kin. *Robinson v. Smith*, 6 Sim. 47; *Walter v. Makin*, 6 Sim. 148; *Jennings v. Gallimore*, 3 Ves. 146. See *Briggs v. Upton*, *supra*. Direction to
pay to repre-
sentatives
where an
executor is
appointed.

6. The same result will follow, if there are words added to the term "representatives" inconsistent with the meaning "executors or administrators," such as "personal representatives or next of kin" (a); or, "such persons as would be the personal representatives of my daughter in case she had died unmarried" (b); or, "legal personal representatives at the time of her death" (c); or, "next legal or personal representatives" (d). *Philps v. Evans*, 4 De G. & S. 188 (a). *Gryll's Trust*, 6 Eq. 589 (b). *Robinson v. Evans*, 22 W. R. 199; 43 L. J. Ch. 82; *Long v. Blackall*, 3 Ves. 486 (c). *Booth v. Vicars*, 1 Coll. 6; *Stockdale v. Nicholson*, 4 Eq. 359 (d). Where the
term represen-
tatives is
coupled with
explanatory
words.

Whether, in this latter case, the next of kin proper or the statutory next of kin take, see *Booth v. Vicars*, *supra*; *Stockdale v. Nicholson*, *supra*.

A gift to personal representatives *per stirpes*, and not *per capita*, has been held to mean descendants. *Atherton v. Crowther*, 19 B. 448; *Re Knowles*; *Rainford v. Knowles*, 59 L. T. 359.

For a direction to pay to "legal representatives according to the course of administration," see *Jennings v. Gallimore*, 3 Ves. 146; *Briggs v. Upton*, 7 Ch. 376.

It would seem, that the addition of the word assigns in a substitutional gift to heirs or representatives would make it impossible to construe these words as equivalent to next of kin. *Grafftey v. Humpage*, 1 B. 46; *Waite v. Templer*, 2 Sim. 524. Effect of the
word assigns.

Chap. XXVI.

EXECUTORS.

Gift to A. and in case of his death to his executors.

A gift to A., and in case of his death to his executors or administrators, will go to A.'s executors in the event of his death before the testator. *Long v. Watkinson*, 17 B. 471; *Re Seymour's Trusts*, Johns. 472; *Maxwell v. Maxwell*, 1 R. 2 Eq. 478; *In re Clay*; *Clay v. Clay*, 32 W. R. 516; affd. 54 L. J. Ch. 648; overruling *Palin v. Hills*, 1 M. & K. 470. See, too, *Aspinall v. Duckworth*, 35 B. 307; *Re Morgan's Trusts*, 2 W. R. 439.

Of course where there is a future gift to A. or his executors, the word executors will be treated as inserted to provide for the death of the donee before the time of vesting in possession. See *Stocks v. Dodsley*, 1 Kee. 325.

Executors taking substitutionally take in trust for the next of kin.

It appears to be now settled, notwithstanding *Evans v. Charles*, 1 Anstr. 128, that executors taking substitutionally take the property to be administered as part of the assets of the original legatee. *Stocks v. Dodsley*, 1 Kee. 325; *Leake v. Macdonnell*, 33 B. 238; *In re Valdez's Trusts*, 40 Ch. D. 159.

Similarly, a gift to the executors of a dead person is a gift to his legal personal representatives as part of his estate. *Trethewy v. Helyar*, 4 Ch. D. 53.

Gifts to the testator's executors only go to them if they accept the office.

A general or specific legacy given by a testator to his executors, whether under the title of executors or not, is *prima facie* given to them in that character, and therefore they are not entitled to the legacies if they decline or are incapable of undertaking the office. *Reed v. Devaynes*, 2 Cox, 285; 3 B. C. C. 95; *Calvert v. Sibbon*, 4 B. 222; *Hanbury v. Spooner*, 5 B. 630; *Hawkins' Trust*, 33 B. 570; *Piggott v. Green*, 6 Sim. 72; *Slaney v. Watney*, L. R. 2 Eq. 418; *In re Appleton*; *Barber v. Tebbit*, 29 Ch. D. 893.

What is a sufficient acceptance of the office.

To entitle an executor to receive his legacy, it is sufficient if he either proves the will, which he may do at any time before the estate is fully administered, or if he acts as executor. *Hollingsworth v. Grassett*, 15 Sim. 52; *Angermann v. Ford*, 29 B. 349; *Harrison v. Rowley*, 4 Ves. 212; *Lewis v. Mathews*, 8 Eq. 277.

And it seems, that if the legacy is directed to be pa

within twelve months, and there is nothing to show that the executor refuses to act, he is entitled to his legacy if he survives the twelve months. *Brydges v. Wotton*, 1 V. & B. 134. Chap. XXVI.

But if the executor acts fraudulently, the mere taking out probate will not entitle him to his legacy. *Harford v. Browning*, 1 Cox, 302.

Where an annuity was given to trustees as a recompense for their care and trouble in the execution of the trusts, it was held that the trustees were entitled to the annuity though they employed an agent to collect the rents. *Wilkinson v. Wilkinson*, 2 S. & St. 237.

But the case is different, if an annuity is given expressly for their services in collecting the rents. In such a case if they employ an agent they cannot take the annuity. *Re Muffett*; *Jones v. Mason*, 55 L. T. 671.

The presumption that a legacy to an executor is given to him in that character for his trouble, is not rebutted by the fact that the legacy precedes the appointment of executors, or by the fact that legacies of unequal amount are given to the executors. *In re Appleton*; *Barber v. Tebbit*, 29 Ch. D. 893; see *Wildes v. Davies*, 1 Sm. & G. 475; 22 L. J. Ch. 497.

In what cases the executor is entitled though he does not act.

The presumption would probably not now be held to be rebutted by difference in the subject-matter of two bequests to executors. *In re Appleton*, *supra*, where *Jewis v. Lawrence*, 8 Eq. 345, is discussed.

The presumption may be rebutted :

1. If some other motive is expressed, as if the gift is to "my friend and executor." *Re Denby*, 3 D. F. & J. 350; *Dix v. Reed*, 1 S. & St. 237; *Cockerell v. Barber*, 2 Russ. 585; *Burgess v. Burgess*, 1 Coll. 367; *Bubb v. Yelverton*, 13 Eq. 131.

2. If the gift is after a life interest. *In re Reeve's Trusts*, 4 Ch. D. 841.

3. If there is a direction that in the event of the executor's death before the testator, his legacy is to go to his next of kin. *In re Bunbury's Trusts*, 1 R. 10 Eq. 408.

4. The presumption does not arise if the gift is of residue.

Chap. XXVI. *Parsons v. Saffery*, 9 Pr. 578; *Griffith v. Pruett*, 11 Sim. 202; *Christian v. Devereux*, 12 Sim. 264.

Whether a
gift of residue
to executors
is beneficial or
in trust.

Whether a gift of residue to executors is a gift to them for their own benefit, or whether they take in trust for the next of kin, depends on the general scheme of the will, and is not affected by the statute 1 Will. IV. c. 40. *Williams v. Arkle*, L. R. 7 H. L. 606.

Thus the following circumstances are in favour of the executors taking beneficially :—

If the gift is not to the executors as such, but by name. *Williams v. Arkle*, L. R. 7 H. L. 606; *Re Henshaw*, 12 W. R. 1139; 34 L. J. Ch. 98; *Hillersden v. Grove*, 21 B. 518.

If the gift is subject to certain payments. *Parsons v. Saffery*, 9 Pr. 578.

On the other hand, the fact that prior legacies have been given to them, or that the bequest is to them as joint tenants, is against their right to the beneficial interest, though not alone conclusive. *Gibbs v. Rumsey*, 2 V. & B. 294; *Re Henshaw*, *supra*; *Saltmarsh v. Barrett*, 3 D. F. & J. 279; see *Buckle v. Bristow*, 13 W. R. 68.

And a direction that the executors are to retain their costs would, it seems, show that they were not to take beneficially. *Saltmarsh v. Barrett*, *supra*.

But a reimbursement clause, where there are continuing trusts, will not have this effect. *Romans v. Mitchell*, 15 W. R. 552.

So where there is no gift to the executors, a direction that they, their heirs, successors, representatives, or descendants may apply and distribute the same as to them may appear just, makes them trustees for the next of kin. *Yeap Cheah Neo v. Ong Cheng Neo*, L. R. 6 P. C. 381; see *Barrs v. Fewkes*, 12 W. R. 666; 13 *ib.* 987; *Caruth v. Parker*, 11 L. R. Ir. 19.

CHAPTER XXVII.

GIFTS TO CHARITABLE USES.

I. WHAT ARE CHARITABLE GIFTS.

CHARITY, in the legal sense, does not necessarily imply relief of the poor. The stat. 43 Eliz. c. 4, defines various kinds of charities. But generally it may be said every gift for a public purpose, general or local, is charitable. See cases cited in the note to *Loscombe v. Wintringham*, 13 B. 87; *Commissioners for special purposes of Income Tax v. Pemsel*, (1891) A. C. 531. Chap. XXVII.
Instances of
charitable
gifts.

Thus gifts for the advancement of education and learning in every part of the world; for the glory of God in the spiritual welfare of His creatures; for the advancement of Great Britain; to any religious institution or purposes; or for charities and other public purposes in a certain parish, are charitable. *Whicker v. Hume*, 7 H. L. 124; *Townsend v. Carus*, 3 Ha. 257; *Powerscourt v. Powerscourt*, 1 Moll. 616; *Nightingale v. Goulbourne*, 5 Ha. 484; 2 Ph. 594; *Wilkinson v. Lindgren*, 5 Ch. 570; *Dolan v. Macdermot*, 3 Ch. 676; *In re Lea*; *Lea v. Cooke*, 34 Ch. D. 528; *In re White*; *White v. White*, (1893) 2 Ch. 41.

Gifts for the increase of knowledge generally or for the promotion of any particular science, or to institutions existing for any of those purposes, such as the British Museum, the Royal Society or the Geographical Society, are good charitable gifts. *President of United States v. Drummond*, 7 H. L. cit. 155; *Re Berridge*; *Berridge v. Turner*, 62 L. T. 365; 63 L. T. 470; *Trustees of British Museum v. White*, 2 S. & St. 594; *Beaumont v. Oliveira*, 4 Ch. 309. Advancement
of science.

A gift to promote the doctrines of a particular sect or a particular person may be a good charitable gift if such doctrines are not of an immoral or irreligious tendency. Thus a gift for printing, publishing and propagating the sacred writings of Promotion of
particular
doctrines.

Chap. XXVII. Joanna Southcote, has been held a good charitable gift. *Thornton v. Howe*, 31 B. 14.

And a gift of £50 a year to be paid to a worthy literary man who had not been very successful in his career, to assist in extending the knowledge of those doctrines in the various branches of literature to which the testator had turned his attention and pen, was held a good charitable gift. *Thompson v. Thompson*, 1 Coll. 395.

Gifts for the benefit of a locality.

In the same way gifts for the benefit of a particular locality are charitable, or for the benefit of a parish, or to repair a sea dyke. *A.-G. v. Hotham*, T. & R. 209; *A.-G. v. Webster*, 20 Eq. 483; *Wilson v. Barnes*, 38 Ch. D. 507.

Art museum.

A gift to form an art museum is a valid charitable gift. *Re Holburne*; *Coates v. Mackillop*, 53 L. T. 212.

But if the art museum is to be established in a house, which is private property, it is not charitable. *Thomson v. Shakespear*, Jo. 612; 1 D. F. & J. 399.

Gifts to voluntary societies.

A gift to a voluntary society established for the personal sanctification of its members, who as a means thereto employ themselves in the exercise of works of piety and charity, is a good charitable gift. *Cocks v. Manners*, 12 Eq. 574; *Mahony v. Duggan*, 11 L. R. Ir. 260; *In re Wilkinson's Trusts*, 19 L. R. Ir. 531.

And a gift to a voluntary society may be charitable even where the funds of the society are applicable only for the relief of its own members, if the relief is of a charitable kind. *Spiller v. Maude*, 32 Ch. D. 158, n.; *Pease v. Pattinson*, 32 Ch. D. 154. See *In re Clark's Trust*, 1 Ch. D. 497.

A gift to a voluntary society existing for the benefit whether pecuniary, moral, or religious, of its own members, is not charitable.

Thus the Penzance Public Library, established by voluntary subscription for the benefit of the subscribers, a Dominican convent of females living together in celibacy for the purpose of sanctifying their own souls by prayer and pious contemplation within their institution, a Friendly Society, an Athenæum and Mechanics' Institution, and a Trade Union, have been held not charitable institutions. *Carne v. Long*, 2 D. F. & J. 75;

Cocks v. Manners, 12 Eq. 574 ; *Morrow v. M'Conville*, 11 L. R. Ir. 236 ; *In re Clark's Trust*, 1 Ch. D. 497 ; *Re Dutton*, 4 Ex. D. 54 ; *Re Joy* ; *Purday v. Johnson*, 60 L. T. 175 ; *In re Amos* ; *Carrier v. Price*, (1891) 1 Ch. 159. Chap. XXVII

There is, of course, nothing invalid in a gift to a voluntary society not charitable if the gift is not given in such a way as to involve a perpetuity. If the gift can be applied at the discretion of the society, it is valid. *Cocks v. Manners*, 12 Eq. 574 ; *In re Wilkinson's Trusts*, 19 L. R. Ir. 531. Validity of gift to voluntary society not charitable.

Stewart v. Green, I. R. 5 Eq. 470 ; *Morrow v. M'Conville*, 11 L. R. Ir. 236, so far as they decide that a gift to a voluntary society not charitable is void because the society has no corporate existence, must be considered overruled. See *Cocks v. Manners*, 12 Eq. 574 ; *In re Wilkinson's Trusts*, 19 L. R. Ir. 531. *Stewart v. Green*, considered.

With regard to a devise of land to a voluntary society there may be a difficulty, as a devise cannot be made to an uncertain body of persons. Devise of land to voluntary society.

Thus a devise of land to the monks named Christian Brothers, who were shown to be a numerous body, was held void on the ground that the intention was to vest the land in them as a body corporate, which they were not. *Hogan v. Byrne*, 13 Ir. C. L. 166 ; see, too, *Stewart v. Green*, I. R. 5 Eq. 470.

In some cases gifts for the benefit of persons united for purposes of charity or religion have been held gifts to the individual members. Thus a devise on trust for the Sisters of Mercy at Bantry was held a trust for the individual ladies known by that name. *In re Delany's Estate*, 9 L. R. Ir. 227. See *Henrion v. Bonham*, O'Leary on Char. 90, cited 11 L. R. Ir. 241. Gifts to individual members of a society.

So gifts to the Superioress of St. Anne's Convent of Mercy in trust for the community of the said convent and to the Marist Sisters of the Convent of C., have been held to be gifts for the individual persons who satisfied the description. *Bradshaw v. Jackman*, 21 L. R. Ir. 12.

Gifts for the general benefit of domestic animals, for instance a gift for establishing slaughter-houses for the relief of and protection from cruelty to the animals taken to be slaughtered, or gifts to a hospital for quadrupeds and birds useful to man, or to Benefit of animals.

Chap. XXVII. the Society for the Protection of Animals from Vivisection, or to the Home for Lost Dogs, are charitable. *University of London v. Yarrow*, 1 De G. & J. 72; *In re Douglas*; *Obert v. Barrow*, 35 Ch. D. 472.

Suppression of vivisection. In Ireland a gift to a society for the suppression of vivisection, has also been held charitable. *Armstrong v. Reeves*, 25 L. R. Ir. 325. See *In re Douglas*; *Obert v. Barrow*, 35 Ch. D. 472; *Re Joy*; *Purday v. Johnson*, 60 L. T. 175.

But gifts for the maintenance of particular animals are not charitable, though they are valid if kept within the limits of perpetuity. *In re Dean*; *Cooper Dean v. Stevens*, 41 Ch. D. 552.

Repair of a church.

Gifts to repair the fabric of a church, or even the ornaments within it, such as a monument or tomb, are charitable. *Hoare v. Osborne*, L. R. 1 Eq. 585.

Gift to build or repair a tomb is not a charity.

A gift to build or repair the tomb of the testator or his family, not within a church, is not charitable. *Mellick v. President of the Asylum*, Jac. 180; *Lloyd v. Lloyd*, 2 Sim. N. S. 255; *Adnam v. Cole*, 6 B. 353; *Rickard v. Robson*, 31 B. 244; *Hoare v. Osborne*, L. R. 1 Eq. 585.

Nor is such a gift within the statute 43 Geo. III. c. 108. *Re Rigley's Trust*, 15 W. R. 190; 36 L. J. Ch. 147.

Such a gift, therefore, if it involves a perpetuity, is void. *Rickard v. Robson*, *supra*; *Yeap Cheah Neo v. Ong Cheng Neo*, L. R. 6 P. C. 381; *In re Vaughan*; *Vaughan v. Thomas*, 33 Ch. D. 187. See *In re Tyler*; *Tyler v. Tyler*, (1891) 3 Ch. 252.

Foreign charity.

A bequest for charitable purposes out of the jurisdiction of the Court, is valid. *Re Geck*; *Freund v. Steward*, 69 L. T. 819.

Liberality, benevolence, utility, hospitality.

A bequest for objects of liberality or benevolence, or for purposes of general utility, or utilitarian purposes, or to be expended in acts of hospitality, is not charitable. *Morice v. Bishop of Durham*, 9 Ves. 399; 10 Ves. 521; *James v. Allen*, 3 Mer. 17; *Kendall v. Granger*, 5 B. 300; *Re Woodgate*, 30 Sol. J. 517; *Re Hewitt*; *Mayor of Gateshead v. Hudspeth*, 49 L. T. 587; 53 L. J. Ch. 132. See *In re Jarman's Estate*; *Leavers v. Clayton*, 8 Ch. D. 584; *In re Douglas*; *Obert v. Barrow*, 35 Ch. D. 472.

Any of these words may be used in such a context as to show that they are equivalent to charitable; but a direction to pay a legacy to be expended in acts of hospitality and charity out of that portion of the personal estate which could be given for charitable purposes, was held not sufficient to show that all the objects were charitable. *Re Hewitt; Mayor of Gateshead v. Hudspeth*, 49 L. T. 587; 53 L. J. Ch. 132. See, too, *Lloyd Graeme v. A.-G.*, 10 T. L. R. 66. Chap. XXVII.

A bequest for private charity is void. *Ommaney v. Butcher*, T. & R. 260; see, however, *In re Sinclair's Trust*, 13 L. R. Ir. 150. Private charity.

A gift for missionary purposes has been held void for uncertainty. *Scott v. Brownrigg*, 9 L. R. Ir. 246. Missionary purposes.

Dissenters and Roman Catholics are, as regards bequests for charitable purposes, on the same footing as the Established Church. 1 W. & M. c. 18; 2 & 3 Will. IV. c. 115, s. 1; *A.-G. v. Pearson*, 3 Mer. 353, 405. Position of Dissenters and Roman Catholics.

Thus, bequests for the maintenance of Protestant Dissenters, or for the assistance of Unitarian congregations, or for the benefit of Irvingites, are valid. *A.-G. v. Pearson*, 3 Mer. 353; *Shrewsbury v. Hornby*, 5 Ha. 406; *A.-G. v. Lawes*, 8 Ha. 32. Dissenters.

So bequests to be applied to the use of Roman Catholic schools, or of a Roman Catholic college existing for the education of ecclesiastics and laymen, or to promote the Roman Catholic religion, or to assist in the completion of a Roman Catholic cathedral, are good. *Bradshaw v. Tasker*, 2 M. & K. 221; *Walsh v. Gladstone*, 1 Ph. 290; *West v. Shuttleworth*, 2 M. & K. 684; *Dillon v. Reilly*, 1 R. 10 Eq. 152. Roman Catholics.

By 9 & 10 Vict. c. 59, s. 2, Jews are, in respect to their schools, places for religious worship, education, and charitable purposes, and the property held therewith, subject to the same laws as Protestant subjects dissenting from the Church of England. Jews.

Since this statute, bequests to enable persons professing the Jewish religion to observe its rites, are valid. *Straus v. Goldsmid*, 8 Sim. 614; *In re Michel's Trusts*, 28 B. 39.

It has been held in Ireland that bequests in favour of Jesuits and members of other religious orders of the Church of Rome bound by monastic or religious vows, are void, as contravening Monastic orders.

Chap. XXVII. the policy of 10 Geo. IV. c. 7 (see sections 33—36). No doubt the same rule would be applied in England.

Thus bequests to be applied for the education and maintenance of priests of the order of St. Dominick in Ireland, and for the use of the Franciscan Convent at Wexford, and to the Christian Brothers at Cork, have been held to be void under the statute. *Sims v. Quinlan*, 16 Ir. Ch. 191; 17 Ir. Ch. 43; *Walsh v. Walsh*, 1 R. 4 Eq. 396; *Kehoe v. Wilson*, 7 L. R. Ir. 10; *Murphy v. Cheevers*, 17 L. R. Ir. 205.

The statute applies whether the monastic body is settled before or since the Act. *Liston v. Keegan*, 9 L. R. Ir. 531.

Societies consisting of females are exempted from the operation of the statute, see sect. 37.

Release of
poachers.

Upon a similar principle, a bequest to purchase the discharge of poachers committed for non-payment of fines, fees, or expenses, under the Game Laws, was held to be void. *Thrupp v. Collett*, 26 B. 125.

Superstitious
uses.

The statutes removing religious disabilities have not affected bequests to superstitious uses.

The Statute of 1 Edw. VI. c. 14, relates only to certain superstitious uses then existing. The earlier statute, 23 Hen. VIII. c. 10, relates only to assurances of land to churches and chapels. But by analogy to these statutes certain bequests are considered void as being superstitious uses. *Cary v. Abbot*, 7 Ves. 490.

Bequests for
masses.

Thus bequests to priests for offering masses for the souls of the dead are void, notwithstanding 2 & 3 Will. IV. c. 115, and go to the next of kin. *West v. Shuttleworth*, 2 M. & K. 684; *Heath v. Chapman*, 2 Dr. 417; *Re Blundell's Trusts*, 30 B. 360; *In re Fleetwood*; *Sidgreaves v. Brewer*, 49 L. J. Ch. 514; 15 Ch. D. 594.

They are void, although the legatee resides in a country where such a gift is good. *In re Elliott*; *Elliott v. Johnson*, 39 W. R. 297.

Land devised for a superstitious use goes to the heir. *R. v. Portington*, 3 Salk. 334; *Crofts v. Evetts*, Moore, 784.

Bequests for
masses in
Ireland.

Bequests for offering up masses for the souls of the dead are not illegal in Ireland. *Commissioners of Charitable Donations*

v. Walsh, 7 Ir. Eq. 34; *Read v. Hodgins*, *ib.* 17; *Brennan v. Brennan*, I. R. 2 Eq. 321; *Phelan v. Slattery*, 19 L. R. Ir. 177; *Bradshaw v. Jackman*, 21 L. R. Ir. 12. Chap. XXVII.

Such bequests, however, though not illegal in Ireland, are not charitable, and are void if they tend to a perpetuity. *Dillon v. Reilly*, I. R. 10 Eq. 152; *A.-G. v. Delaney*, I. R. 10 C. L. 104; *Morrow v. McConville*, 11 L. R. Ir. 236; *Dorrian v. Gilmore*, 15 L. R. Ir. 69; *Reichenbach v. Quin*, 21 L. R. Ir. 138; *Small v. Torley*, 25 L. R. Ir. 388.

Although a gift for the public celebration of the mass is apparently a charitable gift, a gift for masses for the souls of the dead, to be celebrated in public, is not charitable. *Perry v. Tuomey*, 21 L. R. Ir. 480; following *Kehoe v. Wilson*, 7 L. R. Ir. 10.

By the Roman Catholic Charities Act, 23 & 24 Vict. c. 134, sect. 1, it is in effect provided, that dispositions of real or personal estate upon any lawful charitable trust in favour of Roman Catholics shall not be invalidated by reason that the same estate is subjected to a trust deemed to be superstitious, but the property may be apportioned, and a portion applied to the lawful charitable trusts declared by the donor, and the rest applied to charitable purposes for the benefit of Roman Catholics as the Court or the Charity Commissioners may think just.

As to the application of the doctrine of superstitious uses to British Colonies, see *Yeap Cheah Neo v. Ong Cheng Neo*, L. R. 6 P. C. 381, and the authorities there quoted.

Gifts for the relief of aged, impotent, and poor people are enumerated as charitable by the statute 43 Eliz. c. 4. See *Nash v. Morley*, 5 B. 177; *Thompson v. Corby*, 27 B. 649. Gifts for the relief of aged, impotent, and poor people.

But none of these words are necessary to constitute a charitable gift: thus, a gift for the widows and orphans of a parish, or the widows and children of the seamen of Liverpool, is charitable. *A.-G. v. Coombe*, 2 S. & St. 93; *Powell v. A.-G.*, 3 Mer. 48.

A gift in favour of the poor does not include persons receiving parochial relief. *A.-G. v. Price*, 3 Atk. 109; *Bishop of Hereford v. Adams*, 7 Ves. 324; *A.-G. v. Corporation of Exeter*, 2 Russ. 47; 3 *ib.* 396; *A.-G. v. Brandreth*, 1 Y. & C. C.

Chap. XXVII. 200; *A.-G. v. Bovill*, 1 Ph. 762; *A.-G. v. Blizzard*, 21 B. 233.

Gifts to poor relations.

On the question whether a gift to poor relations is charitable:—

1. Of a lump sum immediately distributable.

1. When the gift is of a lump sum immediately distributable, the cases are very unsatisfactory.

a. In several cases it has been held that a gift to poor relations is to be confined to statutory next of kin, thus implying that the gift is not charitable, since, if it were, no question of uncertainty could have arisen. *Carr v. Bedford*, 2 Ch. Rep. 146; *Griffith v. Jones*, *ib.* 394, anno 1694; *Widmore v. Woodroffe*, Amb. 636.

On the other hand, relations were not so restricted in *A.-G. v. Buckland*, *cit.* Amb. 71; 1 Ves. Sen. 231; and *Mahon v. Savage*, 1 Sch. & Lef. 111.

In *Edge v. Salisbury*, Amb. 70; S. C. nom. *Goodinge v. Goodinge*, 1 Ves. Sen. 230; Belt, 128, where the words were “nearest relations,” of course only next of kin could take.

b. In *Brunsdon v. Woolridge*, Amb. 507; 1 Dick. 380, where the will was dated in 1757, and was therefore since the Mortmain Act, a gift of *realty* to such poor relations as A. should think objects of charity, was held valid, and therefore not charitable; and see *Thomas v. Howell*, 18 Eq. 198. But *quære* whether these cases are satisfactory, and whether a gift to poor relations would not now be considered charitable.

2. Of an annual sum.

2. If, however, the gift is not of a sum distributable at once but of an annual sum, or if the testator has contemplated a perpetuity, the gift is charitable and not confined to statutory next of kin. *Isaac v. Defries*, Amb. 595; 17 Ves. 373, n.; *A.-G. v. Price*, 17 Ves. 371; *White v. White*, 7 Ves. 423; *Hall v. A.-G.*, 2 Jarman, 980; *Gillam v. Taylor*, 16 Eq. 581.

If the gift is charitable only, members of the class who are objects of charity, as defined by the statute of Elizabeth, can claim under it. Persons are not entitled to the benefit of the gift merely because they are the poorest of a wealthy class, *A.-G. v. Duke of Northumberland*, 7 Ch. D. 745.

A direction to distribute rents among certain named families

as they may need, has been held not to be a charity. *Lilley v. Hay*, 1 Ha. 580; *sed quære*. Chap. XXVII.

In some cases the question arises, whether a bequest is given in respect of a certain office, and is therefore charitable, or whether the office is merely used to describe the person. Gifts in respect of an office.

Thus, a gift to A., minister of a certain church, is not charitable. *Doe d. Phillips v. Aldridge*, 4 T. R. 264; *Donnellan v. O'Neill*, 1 R. 5 Eq. 523.

But a gift to A., minister of a chapel, and his successors for ever, is charitable. *Thornber v. Wilson*, 3 Dr. 245; see *Robb v. Bp. Dorian*, 1 R. 9 C. L. 483; *ib.* 11 C. L. 292; *Gibson v. Representative Church Body*, 9 L. R. Ir. 1.

Similarly, a gift for the benefit of Roman Catholic priests in or near London is charitable. *A.-G. v. Gladstone*, 13 Sim. 7; 1 Ph. 290.

It has, however, been held that a gift to ten poor clergymen to be selected by a trustee, is not charitable. *Thomas v. Howell*, 18 Eq. 198; and see *A.-G. v. Baxter*, 1 Vern. 248; 2 Vern. 104; explained in 7 Ves. 76.

A bequest to the trustees of a charity for a purpose to be declared, which the testator never does declare, affords no inference that the purpose was charitable, and is therefore void. *Corporation of Gloucester v. Wood*, 3 Ha. 131; 1 H. L. 272; *Aston v. Wood*, 6 Eq. 419; see *Doe d. Toone v. Copestake*, 6 East, 328. Gift to trustees of a charity without more is not charitable.

II. THE DOCTRINE OF CY PRES.

If the testator expresses a general charitable intention the bequest will not fail: General charitable intention carried out.

a. By the failure of the testator to appoint the particular objects he intends to benefit, though the bequest may be to such charitable uses as he shall appoint. *Mills v. Farmer*, 1 Mer. 55; *Commissioners of Charitable Donations v. Sullivan*, 1 D. & War. 501; *Gillan v. Gillan*, 1 L. R. Ir. 114; *Pocock v. A.-G.*, 3 Ch. D. 342.

Upon this principle a bequest of the whole of the testator's property "to the following religious societies namely," followed

Chap. XXVII. by a blank which was never filled up, was held to be a dedication of the whole estate to charitable purposes. *In re White*; *White v. White*, (1893) 2 Ch. 41.

b. By the death, revocation of the appointment, or refusal to act of persons, to whom the testator has given power to apply his property for charitable purposes. *Moggridge v. Thackwell*, 7 Ves. 36; 13 Ves. 416; *White v. White*, 1 B. C. C. 12; *A.-G. v. Boulton*, 2 Ves. Jun. 380; 3 Ves. 220.

c. By the failure or non-existence of the particular objects he has pointed out. *Loscombe v. Wintringham*, 13 B. 87; *Hayter v. Trego*, 5 Russ. 113; *Reeve v. A.-G.*, 3 Ha. 191; *Biscoe v. Jackson*, 35 Ch. D. 460.

d. By the fact that some of the objects specified are void. *Fisk v. A.-G.*, 4 Eq. 521; *Dawson v. Small*, 18 Eq. 114.

e. By the fact that the bequest is to be applied to a particular object at a future time beyond the limits of perpetuity. *Chamberlayne v. Brockett*, 8 Ch. 206.

Doctrine of
cy près.

In such cases the fund does not fall into residue, but the Court carries out the general charitable intention *cy près*, and directs a scheme for that purpose.

And a gift to a particular charity which is capable of taking effect at the testator's death does not fail by the subsequent failure of the charitable object, but the fund will be applied *cy près* by a scheme. *In re Slevin*; *Slevin v. Hepburn*, (1891) 2 Ch. 236.

The doctrine of *cy près* will be applied to a particular charitable gift which becomes incapable of taking effect though the residue is also given to charity. *Mayor of Lyons v. Advocate-General of Bengal*, 1 App. C. 91.

Limits of the
doctrine of
cy près.

The doctrine does not, however, apply in the following cases :—

Gift to a
particular
charitable
society may
fail by lapse.

1. If there is a gift to a particular charitable society by name, and the society has existed, but at the time of the testator's death has ceased to exist, the legacy fails. *Clark v. Taylor*, 1 Dr. 642; *Marsh v. Means*, 3 Jur. N. S. 790; *Russell v. Kellett*, 3 Sm. & G. 264; *Langford v. Gowland*, 3 Giff. 617; *Fisk v. A.-G.*, 4 Eq. 521; *Makeown v. Ardagh*, 1 R. 10 Eq. 445; *In re Ovey*; *Broadbent v. Barrow*, 29 Ch. D. 560; *Re Joy*; *Purday*

v. *Johnson*, 60 L. T. 175; *In re Rymer*; *Rymer v. Stanfield*, Chap. XXVII. (1895) 1 Ch. 19.

If, however, the charity exists at the testator's death, but expires before the estate is administered, the legacy goes to charitable purposes *cy près*. *Hayter v. Trego*, 5 Russ. 113; *In re Slevin*; *Slevin v. Hepburn*, (1891) 2 Ch. 236.

And, if the bequest to the society is expressed to be for a charitable object, the failure of the trustee will not destroy the charitable gift. *Templemoyle School*, I. R. 4 Eq. 295; *Carbery v. Cox*, 3 Ir. Ch. 231; *Marsh v. A.-G.*, 2 J. & H. 61.

General charitable intention.

If the society is misdescribed, the Court will, if possible, discover from surrounding circumstances what society was intended. *Wilson v. Squire*, 1 Y. & C. C. 654; *Bunting v. Marriott*, 19 B. 163; *Kilvert's Trusts*, 12 Eq. 183; 7 Ch. 170; see *Coldwell v. Holme*, 2 Sm. & G. 31; *Makeown v. Ardagh*, I. R. 10 Eq. 445.

Misdescription of a charitable society.

Where a testatrix gave £200 to each of two societies, which amalgamated between the date of her will and her death, it was held that the amalgamated society was entitled to both legacies. *Re Joy*; *Purday v. Johnson*, 60 L. T. 175.

If, however, there is no existing charitable society sufficiently, or there are several equally, answering the description, the gift will not be void, but will be applied *cy près* to charitable purposes, or be divided among the several claimants. *Simon v. Barber*, 5 Russ. 112; *Re Clergy Society*, 2 K. & J. 615; *Loscombe v. Wintringham*, 13 B. 87; *Re Maguire*, 9 Eq. 632; *Re Alchin's Trusts*, 14 Eq. 230.

2. A gift for a clearly-defined and particular charitable object, as to build a church in a particular place, will fail if the object becomes impossible. *A.-G. v. Bishop of Oxford*, 1 B. C. C. 444 n.; *Cherry v. Mott*, 1 M. & C. 123; *Russell v. Kellett*, 3 Sm. & G. 264; *Hoare v. Hoare*, 56 L. T. 147; see, however, as to the limits of this doctrine, *A.-G. v. Bowyer*, 3 Ves. 724; *Abbott v. Fraser*, L. R. 6 P. C. 96; *Biscoe v. Jackson*, 35 Ch. D. 460; *Re Taylor*; *Martin v. Freeman*, 58 L. T. 538.

Gift for a definite charitable object fails if the object is impossible.

In such a case it seems the Court will retain the fund for a time and direct an inquiry as to the possibility of carrying out the bequest. *A.-G. v. Bishop of Chester*, 1 B. C. C. 444;

The Court will direct an inquiry as to the possibility of effecting the object.

Chap. XXVII. *Baldwin v. Baldwin*, 22 B. 419; *Sinnott v. Herbert*, 7 Ch. 232; *Chamberlayne v. Brockett*, 8 Ch. 206; see, too, *Abbott v. Fraser*, L. R. 6 P. C. 96.

Gift to charity upon an event too remote is void.

Though, on the other hand, if the gift to the charity is expressly made upon some event which is too remote, the gift would be void: as, for instance, a gift of a sum of money to build almshouses, when land should be given. *Chamberlayne v. Brockett*, 8 Ch. 206; *In re White's Trusts*, 33 Ch. D. 449; *In re Lord Stratheden and Campbell*; *Alt v. Lord Stratheden and Campbell*, (1894) 3 Ch. 265; and see p. 476.

The question as regards remoteness is whether the property is at once devoted to charity, the actual application being postponed from the necessities of the case. See *Biscoe v. Jackson*, 35 Ch. D. 460.

Discretion to trustees to apply the whole to charity or other indefinite objects.

3. Where a discretion is left to trustees, which would empower them to apply the whole of the gift either to charitable or other indefinite purposes, the whole gift is void, as it does not appear that the chief object was charity, and, on the other hand, the other object is void for uncertainty. *Williams v. Kershaw*, 5 L. J. Ch. 84; 5 Cl. & F. 111; *James v. Allen*, 3 Mer. 17; *Morice v. Bishop of Durham*, 9 Ves. 399; 10 Ves. 521; *Ommaney v. Butcher*, T. & R. 260; *Vezey v. Jamson*, 1 S. & St. 69; *Kendall v. Granger*, 5 B. 300; *Thompson v. Thompson*, 1 Coll. 398; *Boyle v. Boyle*, I. R. 11 Eq. 433; *In re Hewitt's Estate*; *Mayor of Gateshead v. Hudspeth*, 49 L. T. 587; 53 L. J. Ch. 132; see *In re Sutton*; *Stone v. A.-G.*, 28 Ch. D. 464.

The trustees cannot exercise their discretion and appoint the whole to charity. *In re Jarman's Estate*; *Leavers v. Clayton*, 8 Ch. D. 584.

Whether the result would be the same, where the whole might have been applied by the trustees either to charity or some other definite and ascertained object, seems uncertain. *Down v. Worrall*, 1 M. & K. 561; a case of very doubtful authority.

If part must be applied in charity, the Court will ascertain the amount.

But, if the bequest is so expressed as to show, that a portion must be applied to charity, the gift is good, although the charitable trust may be coupled with other trusts, which are void for uncertainty.

In such a case, if it cannot be ascertained how much ought to be applied to each object, the gift will be equally divided among the several objects, including those which are void, as to which the gift will fail *pro tanto*. *Doyley v. A.-G.*, 4 Vin. 485; 7 Ves. 58 n.; *Salisbury v. Denton*, 3 K. & J. 529; *Crafton v. Frith*, 20 L. J. Ch. 198; *Hoare v. Osborne*, L. R. 1 Eq. 585; *In re Rigley's Trusts*, 36 L. J. Ch. 147; see, too, *Re Hall's Charity*, 14 B. 115; *In re Douglas*; *Obert v. Barrow*, 35 Ch. D. 472.

If it is possible to estimate how much ought to be given to each object, an inquiry will be directed. *Adnam v. Cole*, 6 B. 353; *Champney v. Davy*, 11 Ch. D. 949; *In re Vaughan*; *Vaughan v. Thomas*, 33 Ch. D. 187.

4. If a fund is given for a charitable purpose which may exhaust the whole fund and the surplus is then given for some other charitable purpose, if the primary charitable object fails and it cannot be ascertained how much ought to have been expended on it, the gift of the surplus fails also.

Failure of particular gift may involve failure of gift of surplus.

For instance, where there was a direction to build a chapel with a direction to apply the surplus to a charitable object, the gift of the surplus failed. *Chapman v. Brown*, 6 Ves. 404; *A.-G. v. Hinaman*, 2 J. & W. 270; *Cramp v. Playfoot*, 4 K. & J. 479; *Fowler v. Fowler*, 33 B. 616; *Kirkman v. Lewis*, 38 L. J. Ch. 570; *Re Taylor*; *Martin v. Freeman*, 58 L. T. 538.

It is probable that the Court would now go further in ascertaining how much would have been expended on the invalid objects, than it was willing to do in some of the cases cited above.

If the amount which would have been expended in the primary charitable purpose which fails can be ascertained, the Court will direct an inquiry to ascertain it, and the gift of the surplus to the secondary charitable purpose will be valid. For instance, if the testator directs a fund to be applied in building a monument and gives the remainder to a charitable object the Court will ascertain the sum necessary to build a monument. *Mitford v. Reynolds*, 1 Ph. 185; 33 B. 618; *In re Vaughan*; *Vaughan v. Thomas*, 33 Ch. D. 187; see *Magistrates of Dundee v. Morris*, 3 Macq. 134; 6 W. R. 556; *In re Rigley's Trusts*, 36 L. J. Ch. 147.

Chap. XXVII.

When void
gift falls into
gift of residue
of same fund.

5. In some cases where a fund has been directed to be applied to a purpose which failed, and the rest of the fund was given to charity, it has been held upon the construction of the will that the whole fund was applicable to the charitable object. But these decisions must be supported, if at all, on the ground that there was enough in the will to show that the gift of the rest of the fund was intended to include the whole fund, if for any reason it could not be applied to the other objects. *Fisk v. A.-G.*, 4 Eq. 521; *Dawson v. Small*, 18 Eq. 114; *In re Williams*, 5 Ch. D. 735; *In re Birkett*, 9 Ch. D. 576; see *Re Taylor*; *Martin v. Freeman*, 58 L. T. 538.

Gift contrary
to policy of a
statute.

6. Where a bequest is void as contravening the policy of a statute, it will not be carried out *cy près*. *Thrupp v. Collett*, 26 B. 125; *Sims v. Quinlan*, 16 Ir. Ch. 191; 17 *ib.* 43; *Walsh v. Walsh*, I. R. 4 Eq. 397.

Increase in
value of rents
and profits
given to
charity.

7. Where the whole of the rents and profits of land are given to charity, but the objects pointed out do not exhaust the fund, the Court distributes the surplus *cy près*. *Arnold v. A.-G.*, Shower P. C. 22; *Pieschel v. Paris*, 2 S. & St. 384.

Whole rent
given to
charity, the
increase also
passes.

Where a sum, which in fact amounts to the whole of the rents and profits of certain land, is given to charity, this is in effect a dedication to charity of the land itself, and any increase in the rents and profits goes to the same purposes. *Thetford School Case*, 8 Rep. 130 b.

Similarly, if the testator has shown an intention to dispose of the whole to charitable purposes, though there may be a residue undisposed of, it will go to the same purposes. *A.-G. v. Drapers*, 2 B. 508.

And where the whole rents are given in certain proportions among several charitable objects, any increase is apportioned rateably among those objects, subject to the discretion of the Court. *A.-G. v. Jesus Coll.*, 29 B. 163; *A.-G. v. Marchant*, L. R. 3 Eq. 424; *Merchant Taylors v. A.-G.*, 11 Eq. 35; 6 Ch. 513; *A.-G. v. Wax Chandlers*, L. R. 6 H. L. 1.

When certain
payments are
directed out
of the rents
for charitable
objects,
leaving a

But where rents and profits of land are given to a corporation and certain fixed charitable payments are directed, which do not exhaust the whole, and there is no gift of the residue, the residue belongs to the corporation. *A.-G. v. Mayor of Bristol*,

2 J. & W. 291; *A.-G. v. Brasenose Coll.*, 2 Cl. & F. 295; *A.-G. v. Trinity College*, 24 B. 383.

Chap. XXVII.

surplus, the increase does not pass to the charitable objects.

A fortiori, if the surplus is expressly given to the corporation, though the amount of it be specifically mentioned by the testator, any increase, after the payments directed have been made, belongs to the corporation. *Southmolton v. A.-G.*, 5 H. L. 1; *Mayor of Beverley v. A.-G.*, 6 H. L. 310; *A.-G. v. Dean of Windsor*, 8 H. L. 369.

If, among the particular payments directed, some are not charitable, but are to be made to individuals and cannot have been intended to abate, there is an additional argument that none of the particular payments were either to abate or to increase, and that the surplus, whatever it might be, was to go to the donees in trust. *A.-G. v. Cordwainers*, 3 M. & K. 534; *Mayor of Beverley v. A.-G.*, 6 H. L. 310.

On the other hand, if the surplus undisposed of is insignificant, and there is a direction, that the particular payments are to abate proportionately in the event of depreciation of the property, the inference arises, that they were in like manner to share proportionally in any increase. *Mercers' Co. v. A.-G.*, 2 Bl. N. S. 165.

III. ADMINISTRATION OF CHARITABLE GIFTS.

When the bequest is to an existing charitable institution, the bequest is left to be administered as part of the funds of that institution. *Society for P. G. v. A.-G.*, 3 Russ. 142; *Well-beloved v. Jones*, 1 S. & St. 43.

A gift to a charitable institution is administered by the institution.

And a legacy to General Booth "for the spread of the Gospel" was paid over without a scheme, as the legacy was held to be given to him as the head of the Salvation Army and for the purposes of the Army. *In re Lea*; *Lea v. Cooke*, 34 Ch. D. 528.

If the bequest is to an existing charitable institution for purposes other than the purposes for which it exists, the Court will administer the bequest by a scheme to be settled in Chambers, *Cases, supra*.

Chap. XXVII.

A gift to trustees for charitable purposes is administered by the Court.

And, generally, wherever trustees are interposed by the testator, his object will be carried out by the Court by a scheme; but if no trustees are interposed the charity is administered under the Sign Manual. *Moggridge v. Thackwell*, 7 Ves. 36; *Paice v. Abp. of Canterbury*, 14 Ves. 364; *Kane v. Cosgrave*, L. R. 10 Eq. 211.

Gift to foreign trustees for charity.

In the case of a gift to foreign trustees for charitable purposes, the fund will be handed over to the foreign trustees to be administered by them, though the Court here has no control over them. *Re Geck*; *Freund v. Steward*, 69 L. T. 819; see *Re Davis's Trusts*, 61 L. T. 430.

If the foreign trustees disclaim, the Court has no power to settle a scheme, and the gift fails. *A.-G. v. Sturge*, 19 B. 597; *New v. Bonaker*, 4 Eq. 655.

Cases in which the discretion of the trustee is not interfered with.

In some cases, where an annual sum has been directed to be given to a person for his life to be distributed in charity, the Court has refused to interfere with the discretion of the trustee by settling a scheme. *Bennett v. Honywood*, Amb. 708; *Waldo v. Caley*, 16 Ves. 206; *Horde v. Earl of Suffolk*, 2 M. & K. 59.

Where a fund was given for the benefit of the blind in Inverness-shire, and the surviving executor declined to act, the Court gave liberty to the Attorney-General to apply to the Court of Session for a scheme. *In re Fraser*; *Yeates v. Fraser*, 22 Ch. D. 827.

Fund when retained in Court.

Where a testator attaches a continuing condition to a charitable gift, the Court will retain the fund in Court, paying the income to the objects of the charity. *In re Robinson*; *Wright v. Tugwell*, (1892) 1 Ch. 95.

IV. RESTRICTIONS ON GIFTS TO CHARITY.

Mortmain and Charitable Uses Act, 1891.

Before the passing of the Mortmain and Charitable Uses Act, 1891 (54 & 55 Vict. c. 73), land and impure personalty could not be given by will to charity.

But the law has been altered by that Act, which applies only to testators dying after the passing of the Act (the 5th August, 1891).

The Act provides (sect. 3) that land in the Mortmain and Chap. XXVII.
Charitable Uses Act, 1888, and in this Act shall include tenements and hereditaments, corporeal or incorporeal, of any tenure, but not money secured on land or other personal estate arising from or connected with land.

Sect. 5 provides that land may be given by will to or for the benefit of any charitable use, but such land shall, notwithstanding anything in the will contained to the contrary, be sold within one year from the death of the testator, or such extended period as may be determined by the High Court, or any judge thereof sitting at Chambers, or by the Charity Commissioners.

Sect. 6 provides for the sale of the land under order of the Charity Commissioners if not sold within the appointed time.

Sect. 7 provides that any personal estate by will directed to be laid out in the purchase of land to or for the benefit of any charitable uses shall, except as hereinafter provided, be held to or for the benefit of the charitable uses as though there had been no such direction to lay it out in the purchase of land.

Sect. 8 gives power to the Court and the Charity Commissioners to sanction the retention or acquisition of land in certain cases.

Where a testator by will made before but coming into operation after the passing of the Act gave his residue upon trust to pay "such part of my said residuary trust estate which by law may be given for charitable purposes" to a charity, it was held that the whole residue passed under the gift. *In re Bridger; Brompton Hospital for Consumption v. Lewis*, (1893) 1 Ch. 44; (1894) 1 Ch. 297.

The Act applies to gifts in remainder, as a future interest in land may be sold under the Act. *In re Hume; Forbes v. Hume*, 72 L. T. 68.

Cases to which the Act does not apply are governed by the Act of 1888. Mortmain and Charitable Uses Act, 1888 (51 & 52 Vict. c. 42), which repealed and substantially re-enacted the Statute of Mortmain (9 Geo. II. c. 36).

Chap. XXVII. The Act of 1888, sect. 13 (1) provides in effect that the repeal of the Act 9 Geo. II. c. 36, shall not affect the past operation of that enactment, or any instrument executed before the passing of the Act.

It may therefore still be necessary to consider the Act of 9 Geo. II. c. 36 as regards testators who died before the 13th August, 1888, and possibly also as regards testators who died after that date but made their wills before it.

The cases decided under the old law are therefore retained.

Legacy duty. If a charitable legacy was given free of duty, this was in effect a gift of the duty, which could not therefore be paid out of impure personalty. *Wilkinson v. Barber*, 14 Eq. 96.

What is an interest in land within the statute. Money to arise from sale of land.

A. The decisions are numerous as to what is an interest in land within the Statute of Mortmain.

1. Money to arise from the sale of land directed by the testator, though the land is devoted to partnership purposes, is clearly within it. *Page v. Leapingwell*, 18 Ves. 463; *British Museum v. White*, 2 S. & St. 594; *Thorner v. Wilson*, 4 Dr. 350; *Incorporated Church Building Society v. Coles*, 5 D. M. & G. 324; *Ashworth v. Munn*, 28 W. R. 965; 47 L. J. Ch. 747; 15 Ch. D. 563.

Lien for purchase money.

So is the purchase money for land contracted to be sold by the testator, but in respect of which he has a lien at his death, and also a premium payable to the testator in respect of a lease granted at a low rent. *Harrison v. Harrison*, 1 R. & M. 71; *Shepherd v. Beetham*, 6 Ch. D. 597.

Money to arise from sale of land under a prior testator's will.

2. On the question whether money to arise from the sale of land under an instrument other than the testator's will is within the Act, the cases are not entirely satisfactory.

Where land is given by a first testator on trust for sale, a gift of the proceeds by the will of a second testator is within the Act if the time for selling the land has not arrived at the death of the second testator, or if the land has not in fact been sold, and the second testator might have elected to take it as land. *Brook v. Badley*, 4 Eq. 106; 3 Ch. 672; *Lucas v. Jones*, 4 Eq. 73; *A.-G. v. Harley*, 5 Mad. 321.

Where land is given by a first testator on trust for sale and division among several persons, a gift of the proceeds by the

will of a second testator, which does not take effect till after the death of the first, is it seems within the Act, if the property has not in fact been sold before the second testator's death. *Marsh v. A.-G.*, 2 J. & H. 61, is overruled by *Brook v. Badley*, 3 Ch. 672; see *Ashworth v. Munn*, 15 Ch. D. 563.

Chap. XXVII.

The case has been held not within the Act, where leaseholds have been given on trust for sale to pay debts, and have been sold by the executors, in course of administration, after the death of the second testator, though the pure personalty was enough to satisfy the debts. *Shadbolt v. Thornton*, 17 Sim. 49; 13 Jur. 597; but this case is of very doubtful authority. See *Lucas v. Jones*, *supra*.

3. Further, within the Act are the proceeds of growing crops (a), leaseholds (b), money secured by mortgage of land (c), or charged upon land (d), including equitable mortgages (e), and mortgages of leaseholds (f). *Symonds v. Marine Society*, 2 Giff. 325 (a). *Johnston v. Swann*, 3 Mad. 457; *Paice v. Archbishop of Canterbury*, 14 Ves. 364; *Entwistle v. Davis*, 4 Eq. 272 (b). *White v. Evans*, 4 Ves. 21; *Corbyn v. French*, 4 Ves. 418; *Currie v. Pye*, 17 Ves. 462; *Paice v. Archbishop of Canterbury*, 14 Ves. 364 (c). *A.-G. v. Harley*, 5 Mad. 321; *Harrison v. Harrison*, 1 R. & M. 71 (d). *Alexander v. Brame*, 30 B. 153 (e). *Chester v. Chester*, 12 Eq. 444 (f).

Crops, leaseholds.
Mortgages and charges.

Money secured by mortgage of a life interest in a fund invested on mortgage of land is not, but money secured by mortgage of the life interest and reversion in such a fund is within the Act, as in the latter case the mortgagee could by foreclosure make himself the owner of the security upon which the fund is invested. *In re Watts*; *Cornford v. Elliott*, 27 Ch. D. 319; 29 Ch. D. 947.

Where a testator after a life interest directed his testator to transfer the securities, on which his residuary estate might then be invested, or so much thereof as might by law be so applied to a charity, and the trustees after his death made an investment on mortgage, it was held that the mortgage debt could not be given to the charity. *Re Corcoran*; *Corcoran v. Riddell*, 67 L. T. 754.

Investment in mortgage made by trustees.

4. Though personalty may happen to be included in a mort- Mortgage of

Chap. XXVII.

real and
personal
property.

gage given by will, the bequest will not be apportioned, nor will there be an apportionment, if the bequest is of a sum charged upon realty and personalty by a prior testator. *Brook v. Badley*, L. R. 3 Ch. 672; see *In re Hill's Trusts*, 16 Ch. D. 173; *In re Watts*; *Cornford v. Elliott*, *supra*.

But if a sum is secured by a promissory note and a mortgage by deposit, and the property mortgaged is worth only half the debt, the bequest is valid as regards the portion not secured by the mortgage. *Smith v. Sopwith*, W. N. 1877, 208.

Arrears of
rent, judg-
ment charged
on land.

5. Within the statute are arrears of interest due on a mortgage, and rent accrued due since the testator's death, on land contracted to be sold, and a judgment debt, if it is a charge upon realty. *Alexander v. Brame*, 30 B. 153; *Edwards v. Hall*, 11 Ha. 1; *Collinson v. Pater*, 2 R. & M. 344.

Voluntary
covenant to
leave money
is void as
regards real
assets.

6. A voluntary covenant to leave money by will to a charity is in substance a legacy, and is void if the testator leaves only real assets; if he leaves mixed assets, there will be an abatement in the proportion of the pure to the impure personalty. *Jeffries v. Alexander*, 7 D. M. & G. 525; 8 H. L. 594; *Fox v. Lowndes*, 19 Eq. 453.

But where A. covenants to pay a sum to trustees for B. for life with remainder as B. appoints, and B. appoints to a charity, the appointment is good, though the sum may be payable out of impure personalty of A. *In re Robson*; *Emley v. Davidson*, 19 Ch. D. 156.

Shares in
public com-
panies are
not within
the statute,

7. Shares in companies, whether incorporated or not, are not within the statute, provided land is held by them only for the common purposes of the undertaking, and this is the case whether the shares are declared to be personal estate or not, provided the right of the shareholder is merely to call for a share of the profits, and not for a specific part of the land itself. *Walker v. Milne*, 11 B. 507; *Myers v. Perigal*, 11 C. B. 90; 2 D. M. & G. 599; *Edwards v. Hall*, 11 Ha. 1; 6 D. M. & G. 74; *Hayter v. Tucker*, 4 K. & J. 243; *Entwistle v. Davis*, 4 Eq. 272. *Morris v. Glyn*, 28 B. 218, cannot be considered law.

The surplus lands stock of the Metropolitan Railway has been held pure personalty within this principle. *Re Hollon*; *Forbes v. Hardcastle*, 68 L. T. 160; 69 L. T. 425.

It makes no difference that the company whose shares are in question has placed itself in the position of landlord, by letting its land to another company. *Linley v. Taylor*, 1 Giff. 67; 2 D. F. & J. 84. Chap. XXVII.

But if the land is held in trust for each individual shareholder in proportion to his shares, so that each shareholder has a direct and definite interest in the land, the shares are within the statute. *Baxter v. Brown*, 7 M. & Gr. 198. See *Watson v. Spratley*, 10 Ex. 222. unless each shareholder is entitled to a definite proportion of land.

8. As to charges created by public statutory undertakings:—

a. The debentures, mortgage debentures and debenture stock of railway companies are not within the Act, whatever may be the form of the instruments creating them. *Walker v. Milne*, 11 B. 507; *Holdsworth v. Davenport*, 3 Ch. D. 185; *In re Mitchell's Estate*; *Mitchell v. Moberly*, 6 Ch. D. 655; *Attree v. Hawe*, 9 Ch. D. 337; *Re Yerbury's Estate*; *Ker v. Dent*, 62 L. T. 55; overruling *Ashton v. Lord Langdale*, 4 De G. & S. 402. Railway debentures are not within the Act.

The principle of these decisions is that a charge which only gives a right to the net earnings of an undertaking does not confer an interest in land; and although tolls derived from land may also be charged, they are only charged incidentally to the charge on the undertaking.

On the same principle, a waterworks mortgage issued by a corporation, charging the rents, rates, and waterworks, has been held outside the Act, on the ground that it was practically a mortgage of the undertaking. *In re Parker*; *Wignall v. Park*, (1891) 1 Ch. 682, not following *Chandler v. Howell*, 4 Ch. D. 651. Waterworks mortgage.

b. On the same principle, bonds of a corporation charging the borough fund are not within the Act, although the fund arises partly from the rents of land. The principle is, that the charge is only a charge on the floating balance of a fund remaining after purposes made prior to the charge by statute have been satisfied, and that therefore, no receiver of the rents could be appointed. *In re Thompson*; *Bedford v. Teal*, 45 Ch. D. 161. Bonds charging the district fund created by the Public Health Act, 1875, are probably not within the Act, although the fund Corporation bonds.

Chap. XXVII. is partly composed of the proceeds of sale of surplus lands directed by statute to be sold; and certainly not within the Act if there are no surplus lands. *In re Thompson, supra.*

Leeds corporation debenture stock, which is by statute charged "upon the revenues of all landed and other property" of the corporation, is not within the Act. *In re Pickard; Elmsley v. Mitchell*, (1894) 2 Ch. 88; affirmed W. N. 1894, 172; 71 L. T. 558.

Manchester corporation debenture stock which is by statute a charge upon "the city rate and all landed and other property vested in or belonging to the corporation" is within the Act. *Re Holmes; Holmes v. Holmes*, 63 L. T. 477; 60 L. J. Ch. 267.

Charge on
specific tolls.

c. Where there is a charge on specific tolls, rates, or dues, the charge is within the Act, if the toll, rate, or due is an interest in, or connected with land. *Knapp v. Williams*, 4 Ves. 430, n.; *In re Christmas; Martin v. Lacon*, 33 Ch. D. 332; *In re David; Buckley v. Royal National Lifeboat Institution*, 41 Ch. D. 168; 43 Ch. D. 27.

Thus, duties leviable by harbour commissioners on all ships coming within certain limits, whether they use the land of the commissioners or not, are not connected with land; but tolls received for passing over a bridge, the approaches to which belong to the mortgagors, are connected with land. *In re Christmas, supra; In re David, supra.*

Charge on
police rates,
poor-rates.

d. The principle of *Attree v. Hawe* has no application to cases in which tolls, rates or dues are specifically mortgaged (*In re Christmas, supra; In re David, supra*), but it has been sometimes treated as governing such cases. Thus, a charge by justices of the peace on the security of the police rates since 7 & 8 Vict. c. 33 (*In re Harris; Jacson v. Governors of Queen Anne's Bounty*, 15 Ch. D. 561), and a charge on rates leviable by distress in the same manner as poor-rates (*Jervis v. Lawrence*, 22 Ch. D. 202), have been held—in both cases on the authority of *Attree v. Hawe*—to be outside the Act. But probably the older cases, which decided that police rates and poor-rates were within the Act, would now be upheld. *Howse v. Chapman*, 4 Ves. 542; *Finch v. Squire*, 10 Ves. 41; *Thornton v. Kempson*, Kay, 592; see *In re Christmas*, 33 Ch. D. p. 342.

9. Arrears of rent due at the testator's death (a), apportioned rent (b), a royalty on minerals (c), and tenants' fixtures (d), are not within the Act. *Edwards v. Hall*, 11 Ha. 1; 6 D. M. & G. 74 (a). *Thomas v. Stowell*, 18 Eq. 198 (b). *Brook v. Badley*, 4 Eq. 106 (c). *Johnson v. Swann*, 3 Mad. 457 (d).

Chap. XXVII.
Rent, royalties, fixtures.

B. As to what is a gift of personalty to be laid out in the purchase of land or any interest therein within the Mortmain Act:

Money to be invested in land.

1. Money directed to be invested on real securities, or even merely on mortgage security generally, is within the Act. *Baker v. Sutton*, 1 Kee. 224.

Money to be invested on real or mortgage security.

The same is the case if the ultimate object of the bequest is investment in land, though other investments may be authorised in the meantime. *Mann v. Burlingham*, 1 Kee. 235; *A.-G. v. Hodgson*, 15 Sim. 146.

But the gift is valid if an option is left to trustees; for instance, if money is directed to be invested in real or other securities. *A.-G. v. Goddard*, T. & R. 348; *Graham v. Paternoster*, 31 B. 30; *Beaumont's Trusts*, 32 B. 191.

2. A bequest of money to pay off a debt secured by mortgage, whether legal or equitable, of land belonging to a charity is void. *Corbyn v. French*, 4 Ves. 418; *Waterhouse v. Holmes*, 2 Sim. 162; *In re Lynall's Trusts*, 12 Ch. D. 211.

Bequest to pay off the mortgage debt of a charity.

But this is not the case where the debt is no charge upon the land. *Bunting v. Marriott*, 19 B. 163.

3. A gift to improve, repair or enlarge an existing charitable institution is valid. *Edwards v. Hall*, 11 Ha. 1; 6 D. M. & G. 74; *Hawkins' Trust*, 33 B. 570.

Gift to improve, enlarge, or repair.

4. A gift to build a charitable institution is held *prima facie* to imply a direction to purchase land for the purpose, and is void under 9 Geo. II. c. 36. *Chapman v. Brown*, 6 Ves. 404; *A.-G. v. Parsons*, 8 Ves. 186; *Pritchard v. Arbouin*, 3 Russ. 456; *A.-G. v. Davies*, 9 Ves. 535; *Martin v. Wellsted*, 2 W. R. 657; *Longstaff v. Rennison*, 1 Dr. 28; *Watmough's Trusts*, 8 Eq. 272; *Hawkins v. Allen*, 10 Eq. 246; *Pratt v. Harvey*, 12 Eq. 544; see *Re Taylor*; *Martin v. Freeman*, 58 L. T. 538.

Gift to build a charitable institution is void.

A gift to erect a charitable institution does not become valid because made to a corporation which has power to hold land in

Chap. XXVII.

Discretion to build or apply the money in some legal manner.

mortmain, and, in fact, possesses land available for the purposes of the bequest. *In re Cox*; *Cox v. Davie*, 7 Ch. D. 204.

5. If, however, an option is given to the trustees either to build a charitable institution or bestow the money in some other manner which is legal, the bequest is good as regards the legal purpose. *Sorresby v. Hollins*, 9 Mod. 221; *A.-G. v. Whitchurch*, 3 Ves. 141; *Incorporated Society v. Barlow*, 3 D. M. & G. 120; 17 Jur. 217; *Mayor of Faversham v. Ryder*, 18 B. 318; 5 D. M. & G. 350; *Edwards v. Hall*, 11 Ha. 1; 6 D. M. & G. 74; *Dent v. Allcroft*, 30 B. 335; *University of London v. Yarrow*, 1 De G. & J. 72.

And a bequest of impure personalty to such charities as trustees may select is good, since the power can be exercised in favour of charities exempt from the law of mortmain. *Lewis v. Allenby*, 10 Eq. 668.

A discretion to trustees to give a legacy to the poor as they think fit is not within this principle. *In re Clark*; *Husband v. Martin*, 33 W. R. 516.

Gift to "establish" a charity.

6. A direction to "establish" would, it seems, *prima facie* imply building, and come under the same rule as a bequest for building. *A.-G. v. Hodgson*, 15 Sim. 146; *Longstaff v. Rennison*, 1 Dr. 28; *Re Clancy*, 16 B. 295; *A.-G. v. Hall*, 9 Ha. 647; *Dunn v. Bownas*, 1 K. & J. 591; *Tatham v. Drummond*, 4 D. J. & S. 484.

The word may be used in such a context as to exclude building *A.-G. v. Williams*, 2 Cox, 387; *Hill v. Jones*, 2 W. R. 657.

And the fact, that an annual sum only is given to establish a school, would apparently go to show that the testator did not contemplate building. *Hartshorne v. Nicholson*, 26 B. 58.

The same is the case with an annual sum given to "provide" a school, which may only mean that a school is to be hired. *Johnston v. Swann*, 3 Mad. 457; *Crafton v. Frith*, 20 L. J. Ch. 198; 15 Jur. 737.

A gift to "support, or found" a school is valid. *In re Hedgman*; *Morley v. Croxon*, 8 Ch. D. 156.

A bequest to "found" a chapel implies building. *Hopkins v. Phillips*, 3 Giff. 182.

A direction to hire rooms, does not bring a gift within the

Mortmain Act. *In re Robson*; *Emley v. Davidson*, 19 Ch. D. Chap. XXVII. 156; *Re Holburne*; *Coates v. Mackillop*, 53 L. T. 212.

On the other hand a gift to "endow" would not *prima facie* authorise building, though the word may be so used as to involve it. *Salisbury v. Denton*, 3 K. & J. 529; *Edwards v. Hall*, 11 Ha. 1; *Sinnett v. Herbert*, 7 Ch. 233; *Kirkbank v. Hudson*, 7 Pr. 212; *Re Holburne*; *Coates v. Mackillop*, 53 L. T. 212.

Gift to endow a charity.

7. But, even though the object of the gift may *prima facie* imply the purchase of land, it may appear that the testator had no such intention. He may have contemplated the building as to be erected either on land already in mortmain, or on land to be provided after his death from some other source.

Evidence of intention that the testator did not contemplate the purchase of land.

(a.) Thus, if the testator contemplated land already in mortmain, a gift to build a charitable institution is good. This will be the case:—

- (i.) If land already in mortmain is expressly referred to in the will. *Glubb v. A.-G.*, Amb. 373; *Brodie v. Duke of Chandos*, 1 B. C. C. 444 n.

Land in mortmain referred to expressly,

If it is uncertain, whether the land upon which the testator directs the money to be laid out is already in mortmain or not, an inquiry will be directed. *Champney v. Dary*, 11 Ch. D. 949.

- (ii.) If land already in mortmain is impliedly referred to, as by a direction to build in such manner as is consistent with law. *Dent v. Allcroft*, 30 B. 335; *Sewell v. Crewe-Read*, L. R. 3 Eq. 60.

by implication,

- (iii.) External evidence may be adduced in order to show that the testator must have contemplated land in mortmain, though as to the exact amount of evidence necessary for this purpose the cases are not quite consistent. *A.-G. v. Hyde*, Amb. 751; *Giblett v. Hobson*, 3 M. & K. 517; *Booth v. Carter*, L. R. 3 Eq. 757; *Cresswell v. Cresswell*, 6 Eq. 69.

by external evidence.

(b.) When the testator intends the buildings to be erected on land to be supplied from some other source after his death:—

- (i.) It is clear, that a direct inducement offered to any person

Inducement to give land

Chap. XXVII.

- to give land for the purpose of the building, as, for instance, a bequest to A. to build if he will give the land, is bad. *A.-G. v. Davies*, 9 Ves. 535.
- Direction to beg land. (ii.) If the trustees are directed to beg the land from some person, but their own implied power to purchase remains, the bequest is bad. *Mather v. Scott*, 2 Kee. 172.
- Direction not to buy land. (iii.) Where the bequest is to build, with an express direction, that land is not to be bought for the purpose, or that the Mortmain Act is not to be violated, the bequest is valid, whether made conditional upon land being provided, or without any condition. *Henshaw v. Atkinson*, 3 Mad. 306; *A.-G. v. Williams*, 2 Cox, 387; *Carwood v. Thompson*, 1 Sm. & G. 409; *Philpott v. Governors of St. George's Hospital*, 6 H. L. 338 (overruling *Trye v. Corporation of Gloucester*, 14 B. 173); *Chamberlayne v. Brockett*, 8 Ch. 206; *In re White's Trusts*, 30 W. R. 837; *Re Jackson*; *Biscoe v. Jackson*, 35 Ch. D. 460.
- Bequest to a charity, the object of which is to acquire land. 8. Upon similar principles, a bequest to the trustees of a charity which exists only for the purchase of land is void. *Widmore v. Woodroffe*, Amb. 636; *Middleton v. Clitheroe*, 3 Ves. 734; *Denton v. Lord J. Mannors*, 25 B. 38; 2 De G. & J. 675.
- On the other hand, it is good if it exists for the purchase of land or other objects. *Incorporated Society v. Barlow*, 3 D. M. & G. 120; *Carter v. Green*, 3 K. & J. 591; *Wilkinson v. Barber*, 14 Eq. 96.
9. A bequest of money to be employed in enlarging or improving a charitable object attempted to be created by a testator fails, if the original object is invalid. *A.-G. v. Hinaman*, 2 J. & W. 270; *Smith v. Oliver*, 11 B. 481; *Crump v. Playfoot*, 4 K. & J. 479; *Green v. Britten*, 42 L. J. Ch. 187; *In re Cox*; *Cox v. Davie*, 7 Ch. D. 204; *Re Taylor*; *Martin v. Freeman*, 58 L. T. 538.
- Bequest for foreign charity. 10. A bequest of the proceeds of sale of land in England to be laid out in the purchase of land for charitable purposes in a country where land may be well given to charity is void. *Curtis v. Halton*, 14 Ves. 537; *A.-G. v. Mill*, 3 Russ. 328; 5 Bl. N. C. 593; 2 Dow. & Cl. 393.

But the Statute of Mortmain leaves bequests of money to be laid out in the purchase of land for charitable purposes in other countries untouched. *Mackintosh v. Townsend*, 16 Ves. 330; see *Whicker v. Hume*, 7 H. L. 124. Chap. XXVII.

The Statute of Mortmain does not apply to the Colonies. Therefore a gift by a testator domiciled in a colony of money to be laid out in purchasing land in England for a charitable purpose is good. *Mayor of Canterbury v. Wyburn*, (1895) A. C. 89.

C. Exceptions from the Statute of Mortmain.

The Universities of Oxford and Cambridge, and the colleges and houses of learning in the two Universities, and the Colleges of Eton, Winchester and Westminster, are excepted from the operation of the Act 9 Geo. II. c. 36. But this exception only authorises devises to these institutions for all or some of the purposes for which they exist, and not upon trust for other charitable objects. *A.-G. v. Tancred*, 1 Ed. 10; 1 W. Bl. 90; Amb. 351; *A.-G. v. Whorwood*, 1 Ves. 534; *A.-G. v. Munby*, 1 Mer. 327. Universities and colleges of Oxford and Cambridge, and Eton, Winchester, and Westminster excepted from the Act.

And if there is a good devise of lands to a college for charitable objects, which the college refuses to accept, the object will be carried out *cy près*. *A.-G. v. Andrew*, 3 Ves. 633.

The Act of 1888, sect. 7 (1), continues the exception, and extends it to the Universities of London and Durham, and the Victoria University, and the colleges and houses of learning within any of these universities, and to Keble College.

Before the Wills Act, it seems that a devise to a college did not carry the legal estate, notwithstanding *Benet College v. Bishop of London*, 2 W. Bl. 482, which was decided upon an erroneous interpretation of the statute 43 Eliz. c. 4, that statute being merely remedial and not intended to authorise what was illegal before. See *Incorporated Society v. Richards*, 1 D. & War. 258. Whether a college takes the legal estate.

Whether a devise to a college since the Wills Act would carry the legal estate seems doubtful. See p. 98.

The fact that a charity is empowered by Act of Parliament to hold lands does not entitle a testator to devise lands to it. *Robinson v. Governors of London Hospital*, 10 Ha. 19; In what cases charities empowered to hold lands may take by devise.

Chap. XXVII. *Nethersole v. School for the Indigent Blind*, 11 Eq. 1; *Chester v. Chester*, 12 Eq. 444.

But where charities are empowered to acquire lands by will, testators are of course entitled to devise lands to them. *Perring v. Traill*, 18 Eq. 88.

But it seems that such a power to take lands by devise, would not necessarily authorise a bequest of money secured on mortgage. *Chester v. Chester*, *supra*.

An Act passed before the Act 9 Geo. II. c. 36, and enabling a charitable corporation to take lands without a licence in mortmain, by authorising testators to devise lands to the corporation, does not exempt the corporation from the operation of 9 Geo. II. c. 36. *Luckraft v. Pridham*, 6 Ch. D. 205.

Redemption
of land tax.

Under 42 Geo. III. c. 116, s. 50, money may be given by will or otherwise for redeeming the land tax on lands settled to charitable uses.

Under section 162 of the same Act land tax redeemed or purchased may be given by deed or will for the augmentation of any living.

Statute 43
Geo. III.
c. 108.

The statute 43 Geo. III. c. 108, authorises the devise of lands not exceeding five acres, or of goods or chattels to the amount of 500*l.* for erecting, repairing, or providing any church or chapel where the Liturgy of the Church of England is used, or any mansion-house for any minister of the said Church, and other similar purposes.

This Act does not extend to women covert without their husbands, and the Married Women's Property Act, 1882, has not removed the disability. *In re Smith's Estate; Clements v. Ward*, 35 Ch. D. 589.

Under this Act a secret trust to devote a chapel comprised in a residuary devise to the purpose of a parish church has been upheld. *O'Brien v. Tyssen*, 28 Ch. D. 372.

Under the same Act a bequest of 500*l.* towards building a church, if the testator survives the making of the will three months, is good. *Dixon v. Barlow*, 3 Y. & C. Ex. 677; *Girdlestone v. Creed*, 10 Ha. 480.

The Act, however, does not authorise a devise of lands to be sold and the proceeds to be applied towards the purposes of the

Act. *Incorporated Church Building Society v. Coles*, 1 K. & J. 145; 5 D. M. & G. 324. Chap. XXVII.

Under this Act gifts to keep in repair a parish churchyard (a), and to purchase a new clock for a parish church (b), have been held good. *In re Vaughan*; *Vaughan v. Thomas*, 33 Ch. D. 187 (a); *Re Hendry*; *Watson v. Blakeney*, 56 L. T. 908 (b).

The effect of the Act is that under a bequest towards building a church the legacy will be apportioned between the pure and impure personalty, and be paid out of pure personalty to the extent of its proportion, and out of the impure personalty to the extent of 500*l.* *Sinnett v. Herbert*, 7 Ch. 232; *Champney v. Davy*, 11 Ch. D. 949.

Under 6 & 7 Vict. c. 37, sect. 9, the Ecclesiastical Commissioners may constitute districts for spiritual purposes, and by sect. 22 land or money may be given by deed or will for the endowment of the minister of a district, or for providing a church or chapel under the Act. Endowment of districts for spiritual purposes.

Under this Act a direction to apply a sum for the purposes authorised by the Act, if the object can be legally carried out within twenty-one years from the testator's death, is valid, if a district is constituted within the stated period, though no district has been constituted at the testator's death. *Baldwin v. Baldwin*, 22 B. 419.

By the Mortmain and Charitable Uses Act, 1888 (51 & 52 Vict. c. 42), sect. 6, twenty acres may be given for a park, two acres for a museum, and one acre for a school-house, but the will must be executed twelve months before the death. Public parks, schools, and museums.

By the Ancient Monuments Protection Act, 1882 (45 & 46 Vict. c. 73), ancient monuments, to which the Act applies, may be devised to the Commissioners of Works who may accept the devise. Ancient monuments.

By the Department of Science and Art Act, 1875 (38 & 39 Vict. c. 68) land may be devised to the Department of Science and Art for the purposes of their charter or for any educational or public purpose. Department of Science and Art.

A list of charities excepted from the Mortmain Act will be found in Tudor's Real Property Cases, p. 568.

Chap. XXVII.

Secret trust
of land in
favour of
charity is bad,
but the
devisee takes
the legal
estate.

The Statute of Mortmain cannot be avoided by a secret trust in favour of a charity. *Russell v. Jackson*, 10 Ha. 204.

In such a case, however, the devisee takes the legal estate. *Sweeting v. Sweeting*, 12 W. R. 239.

Where land is devised on trust for a person for life with remainder to charity, the legal estate is well devised for life. *Young v. Grove*, 4 C. B. 668.

The legal estate passes when the trust is for charity, and for other objects which are valid. *Doe d. Chidgey v. Harris*, 16 M. & W. 517, 518.

But a devise of lands on an express trust for charity only is void, as regards the legal estate as well, by the statute 9 Geo. II. c. 36. *Doe d. Burdett v. Wrighte*, 2 B. & Ald. 710; see *Churcher v. Martin*, 42 Ch. D. 312.

CHAPTER XXVIII.

SUCCESSIVE AND CONCURRENT INTERESTS, JOINT
TENANCY AND TENANCY IN COMMON.

I. DEVISE TO A CLASS IN TAIL.

IN some cases the question has arisen whether the gift is to several persons concurrently, or whether they are intended to take successively; thus a devise to the sons of a person in tail is *prima facie*, a gift to a class. *De Windt v. De Windt*, L. R. 1 H. L. 87; *Surtees v. Surtees*, 12 Eq. 400.

But, if there is a general intention manifest to keep the estates together in a single line of enjoyment, the members of the class will take successively. *Cradock v. Cradock*, 4 Jur. N. S. 626, 656; *Allgood v. Blake*, L. R. 7 Ex. 339; *ib.* 8 Ex. 160.

Chap.
XXVIII.

Devise to a class in tail gives concurrent interests,

unless there is an intention expressed to keep the property together in one line of enjoyment.

II. GIFTS TO A PARENT AND CHILDREN.

In the same way a gift to a parent and children is *prima facie* a gift to them concurrently. *Mason v. Clarke*, 17 B. 126; *Sutton v. Torre*, 6 Jur. 234; *Wilson v. Maddison*, 2 Y. & C. C. 372; *Beales v. Criesford*, 13 Sim. 592; *Newill v. Newill*, 12 Eq. 432; 7 Ch. 253. See *Cape v. Cape*, 2 Y. & C. Ex. 543.

Gift to a parent and children gives them concurrent interests.

The fact that the gift is to the parent in trust for herself and her children, is not sufficient to show that they are not to take concurrently. *Newill v. Newill*, 7 Ch. 253. See *Curtis v. Graham*, 12 W. R. 998. *Ward v. Grey*, 26 B. 485, probably goes beyond the present tendency of the Court.

But, if there is anything to show, that the parent is to take a different interest from that of the children, he will take for life, with remainder to the children.

What is a contrary intention.

Chap.
XXVIII.
Words of
distribution
applied to the
children only.

1. If the bequest is to A. and his children as tenants in common, if more than one, showing that the tenancy in common is to apply to children only, the father takes for life. *Doe d. Davy v. Burnsall*, 6 T. R. 30; 1 B. & P. 215, where issue must have meant children by the force of the gift over in default of issue of such issue. See *Doe d. Gilman v. Elvey*, 4 East, 313.

Words of
limitation
applied to the
children only.

2. A devise to A. and his children and the heirs of the parent and children, gives a joint estate in fee, or an estate tail to the parent, according as there are or are not children living at the time of the devise. *Oates d. Hatterly v. Jackson*, 2 Str. 1172; *Underhill v. Roden*, 2 Ch. D. 494.

But a devise to A. and his children, and the heirs of the children, would give A. an estate for life with remainder to his children. *Jeffery v. Honeywood*, 4 Mad. 398, was decided on this ground, though it would seem the word heirs referred to the parent as well as the children.

Settlement
directed of the
whole fund.

3. If the bequest is to a father and his children, and there is a desire expressed that the whole fund should be settled or secured, a term which would have no meaning as applied to the father's interest as joint tenant, the father takes for life. *Vaughan v. Marquis of Headfort*, 10 Sim. 639; *Combe v. Hughes*, 14 Eq. 415.

If a continuing trust is created, which is contemplated as outlasting the parent's life, there is room for a similar argument in favour of a life interest in the parent. *Ogle v. Corthorn*, 9 Jur. 325.

Gift of the
whole fund to
the separate
use.

4. Whether, where the gift is to the separate use of the mother, it will be considered a sufficient indication of intention to cut the interest of the parent down to a life interest is not certain. On the whole, the better opinion seems to be, that where the words creating the separate use apply to the whole fund or legacy, it will be construed as giving the mother a life interest. *Newman v. Nightingale*, 1 Cox, 341; *French v. French*, 11 Sim. 257; *Bain v. Lescher*, 11 Sim. 397; *Froggatt v. Wardell*, 3 De G. & S. 685; *Dawson v. Bourne*, 16 B. 29; *Jeffery v. De Vitre*, 24 B. 296; *Scott v. Scott*, 11 Ir. Ch. 114; *Ogle v. Corthorn*, 9 Jur. 325, in which case the Vice-Chancellor Wigram thought that a gift to the separate use was conclusive

against the children participating with their mother. *Combe v. Hughes*, 14 Eq. 415.

Chap.
XXVIII.

On the other hand, the cases of *De Witte v. De Witte*, 11 Sim. 41, and *Bustard v. Saunders*, 7 B. 92 (which, however, only followed *De Witte v. De Witte*), are inconsistent with this rule. See *In re Seyton*; *Seyton v. Satterthwaite*, 34 Ch. D. 511, 515.

If the interest of the mother alone is given to her separate use, or the separate use attaches to the interests of all alike, no argument in favour of a life estate can be founded upon the separate use. *Fisher v. Webster*, 14 Eq. 283; *Newsom's Trusts*, 1 L. R. Ir. 373.

Separate use attached to parent's interest or to interests of all.

The same is the case if her interest only is directed to cease on marriage. *Izod v. Izod*, 11 W. R. 452.

5. If upon the marriage of their mother the fund is to be divided among the children, this affords an argument, that it is not to be divided before, and the mother takes for life or till marriage. *Mill v. Mill*, 1 R. 9 Eq. 104; *ib.* 11 Eq. 158.

Division of the whole fund directed at a particular time.

6. If the whole fund is contemplated as remaining undisposed of, if there are no children, if there is a gift over for instance in default of children, the same construction is adopted. *Audsley v. Horn*, 26 B. 195; 1 D. F. & J. 226. See *Lampley v. Blower*, 3 Atk. 396.

Gift over of the entire fund if there are no children.

7. If the children are contemplated as taking shares in the whole fund by a direction, for instance, that if there is but one child the whole is to go to that child, since the children are to take the whole, the parent to take anything must take a life interest. *Garden v. Poultney*, Amb. 499; 2 Ed. 323; *Audsley v. Horn*, 26 B. 195; 1 D. F. & J. 226.

Children contemplated as taking the whole fund.

8. If the bequest is such, as expressly to include all the children of the parent, and not merely those in being at the period of distribution, it will be construed to give a life estate to the parent, with remainder to the children, since it is a singular intention to impute to the testator that the parent's interest in the estate should continually diminish on the birth of a new child. *Jeffery v. De Vitre*, 24 B. 296; *Jeffery v. Honeywood*, 4 Mad. 398.

Express gift to after-born children.

9. If the legacy is payable in part at once, and in part at a future period, the parent will take for life, as otherwise different

Part of the fund payable

**Chap.
XXVIII.**

at a future
period.
Effect of a
gift to the
children in
unequal
shares in
certain events.

Words im-
plying that
children are
not to take till
their parent's
death.

Reference to
other gifts.

Executory
trust.

classes of children might take the two portions. *Morse v. Morse*, 2 Sim. 485.

10. If in the event of the mother's death before the testator the children are to take unequal shares, the presumption of joint tenancy is apparently rebutted. *Armstrong v. Armstrong*, 7 Eq. 518.

11. If the children are contemplated as not enjoying the property till after their mother's death, by being called heirs for instance, the parent takes for life only. *Crawford v. Trotter*, 4 Mad. 36; *Ogle v. Corthorn*, 9 Jur. 325; *Wilson v. Vansittart*, Amb. 561.

12. There may be a reference to another gift, to assist the Court in giving the parent a life interest. *French v. French*, 11 Sim. 257; *In re Owen's Will*, 12 Eq. 316.

13. An executory trust for A. and her children will be settled on A. for life, and afterwards for her children. *In re Bellasis' Trust*, 12 Eq. 218.

III. JOINT TENANCY, TENANCY IN COMMON AND BY ENTIRETIES.

Gift to several
with words of
limitation is a
joint tenancy.

Interests of
joint tenants
need not vest
at the same
time.

"All and
every."

Devise to two
in tail who
may marry.

Appointment
to object and
non-object.

A. What creates a joint tenancy.

A gift to two persons or to a class with words of limitation *primâ facie* constitutes a joint tenancy between them.

The rule, that the interests of joint tenants must vest at the same time, does not apply to estates raised by use, or to wills. *Macgregor v. Macgregor*, 1 D. F. & J. 63; *O'Hea v. Slattery*, (1895) 1 I. R. 7.

Thus a gift to the children or to all and every the child or children of A. creates a joint tenancy between them. *Kenworthy v. Ward*, 11 Ha. 196; *Morgan v. Britten*, 13 Eq. 28; see *Jury v. Jury*, 9 L. R. Ir. 207.

A devise to two persons who may intermarry, though they may both be married already, and the heirs of their bodies, makes them joint tenants in tail. Co. Lit. s. 25, p. 25 b.

If an appointment under a special power is made in favour of A. and B. as joint tenants, and A. is not an object of the power, B. takes only a moiety, and the other moiety goes as in default of appointment. *In re Kerr's Trusts*, 4 Ch. D. 600.

B. Joint life estates several inheritances.

Chap.
XXVIII.

Intermediate between cases of joint tenancy and of tenancy in common falls a class of cases, in which, in order to give effect to the whole devise, joint estates for life and several inheritances are given.

A devise to several persons who cannot marry, and the heirs of their bodies, gives them joint estates for life with several inheritances in tail. *Fearne*, C. R. 35; *Cook v. Cook*, 2 Vern. 545; *Forrest v. Whiteway*, 3 Ex. 367; *Edwards v. Champion*, 3 D. M. & G. 202, 214; *Tufnell v. Borrell*, 20 Eq. 194.

Devise to several in tail who cannot marry.

A devise to a man and two women, or to two men and one woman, and the heirs of their bodies gives them joint estates for life and several inheritances. Co. Lit. 25 b.

A devise to two husbands and their wives, and the heirs of their bodies, gives joint estates for life, and several inheritances; the one husband and wife the one moiety, the other husband and wife the other moiety. Co. Lit. 25 b.

A devise to several and the heirs of their respective bodies, gives joint estates for life and several inheritances. But a devise to children and the heirs of their bodies respectively, gives several estates in tail. *In re Tiverton Market Act*; *Ex parte Tanner*, 20 B. 374.

Force of word
respective.

In the case of real estate devised to several and their heirs a similar principle has been followed, words of severance being referred to the inheritance, leaving the life interests joint.

Devise to several in fee.

This construction is assisted if there is an express limitation to the survivor or such words as jointly are used. *Barker v. Giles*, 2 P. W. 280; 3 B. P. C. 297; see *Cookson v. Bingham*, 3 D. M. & G. 668.

Thus a devise to A. and B. equally as joint tenants, and their several and respective heirs, gives joint estates for life with several inheritances. *Doe d. Littlewood v. Green*, 4 M. & W. 229.

A devise to several and their heirs respectively creates a tenancy in common. *Torret v. Frampton*, Styles, 434.

A devise to several and their respective heirs, and a bequest of personalty to several and their respective executors, administrators, and assigns, gives, in the one case, joint estates for

Chap.
XXVIII.

life and several inheritances, and in the other, joint interests for life and absolute interests in remainder. *In re Tiverton Market Act, supra*; *In re Atkinson*; *Wilson v. Atkinson*, (1892) 3 Ch. 52.

But a bequest of personalty to four persons and to each of their respective heirs, executors, administrators, and assigns creates a tenancy in common. *Gordon v. Atkinson*, 1 D. G. & S. 478.

A devise to several and the survivor and the heirs of such survivor gives joint life estates with a contingent remainder in fee to the survivor. *Vick v. Edwards*, 3 P. W. 371; *Re Harrison*, 3 Anst. 836; *Fearne*, C. R. 357—359; see *Quarm v. Quarm*, (1892) 1 Q. B. 184, as to the effect of such a devise after the Wills Act.

But a devise to several and the survivor their heirs and assigns for ever gives joint estates in fee. *Doe v. Sotheran*, 2 B. & Ad. 628, 635.

C. Severance of joint tenancy.

1. Destruction of unity of estate.

Acquisition of
reversion by
joint tenants
for life.

If there are joint tenants for life and the reversion is acquired by one of them either by purchase or descent the joint tenancy is severed as regards that one. *Wiscot's Case*, 2 Rep. 60; *Robert Morgan's Case*, 2 Anderson, 202.

A joint tenant
becoming
trustee for
himself and
others.

And a joint tenancy is severed if the property becomes vested in one of the joint tenants as trustee for himself and the other joint owner. *Connolly v. Connolly*, 1 R. 1 Eq. 376.

2. Severance by disposition.

Disposition
by joint
tenant.

A joint tenancy may also be severed by a disposition by one of the joint owners amounting at law or in equity to an assignment of the share.

If the disposition is to one of the joint tenants, the joint tenancy is severed as regards the share conveyed, but subsists as regards the other shares. Lit. 304.

Covenant to
settle.

A covenant to settle severs a joint tenancy, if the covenant applies to the share of the joint tenant, though the joint tenancy may be created by an instrument not coming into operation till after the date of the covenant. *Caldwell v.*

Fellowes, 9 Eq. 410; *Baillie v. Treharne*, 17 Ch. D. 388; *In re Hewett*; *Hewett v. Hallett*, (1894) 1 Ch. 362.

Chap.
XXVIII.

The fact that the covenant is entered into by an infant does not prevent a severance if the settlement is not avoided when the infant comes of age. *Burnaby v. Equitable Reversionary Interest Society*, 28 Ch. D. 416.

Covenant by
infant.

A mortgage by one joint tenant of his interest of course severs the joint tenancy. *In re Pollard's Estate*, 3 D. J. & S. 541.

Mortgage.

A partial disposition may also sever the joint tenancy.

Partial
disposition.

Thus, if two are joint tenants in fee, and one makes a lease for the life of the lessee the joint tenancy is wholly severed. Lit. 302; Co. Lit. 191 b.

So if two are joint tenants for years a lease for years by one completely severs the joint tenancy. Co. Lit. 192 a.

Possibly a lease for years by a joint tenant in fee only severs the joint tenancy during the term. *Clerk v. Clerk*, 2 Vern. 323; an unsatisfactory case.

An application by petition or summons by a joint tenant for payment of his share does not sever the joint tenancy until an order for payment is made. *In re Wilks*; *Child v. Bulmer*, (1891) 3 Ch. 59.

Petition for
payment.

The old law as to severance by marriage has become of small importance since the Married Women's Property Act.

Severance by
marriage.

Before that Act marriage severed the wife's joint tenancy as regards chattels. *Bracebridge v. Cook*, Plowd. 416, 418.

It did not sever the wife's joint tenancy in chattels real or choses in action, whether in reversion or possession. Co. Lit. 185 b.; *In re Barton's Will*, 10 Ha. 12; *Armstrong v. Armstrong*, 7 Eq. 518; *In re Butler's Trusts*; *Hughes v. Anderson*, 38 Ch. D. 286, overruling *Baillie v. Treharne*, 17 Ch. D. 388.

3. Severance by agreement.

A joint tenancy may also be severed by agreement between the parties which may be either in writing or may be inferred from a course of dealing. *Gould v. Kemp*, 2 M. & K. 304; *Wilson v. Bell*, 5 Ir. Eq. 501; *Williams v. Hensman*, 1 J. & H. 546.

Agreement
to sever.

Chap.
XXVIII.

Joint tenancy
in income.

A joint tenancy in income is severed as regards each instalment as soon as it becomes payable. *Walmsley v. Foxhall*, 40 L. J. Ch. 28.

D. What creates a tenancy in common.

The Court
leans to a
tenancy in
common.

1. The Court leans towards a tenancy in common, and will prefer it, when there is a doubt, or the testator has given the legatees a choice between a joint tenancy and tenancy in common. *Booth v. Alington*, 3 Jur. N. S. 835; 27 L. J. Ch. 117; 5 W. R. 811; *Oakley v. Wood*, 16 L. T. N. S. 450; 37 L. J. Ch. 28.

Jointly and
equally.

So in several cases where there have been such words as "jointly and equally" the Courts have held the gift a tenancy in common. *Ettricke v. Ettricke*, Amb. 656; *Perkins v. Baynton*, 1 B. C. C. 118.

What words
create a
tenancy in
common.

2. Words of division or distribution, such as "to be divided," or "equally," or "between," or "amongst," or "respectively," make a tenancy in common. *Vanderplank v. King*, 3 Ha. 1; *Campbell v. Campbell*, 4 B. C. C. 15; *A.-G. v. Fletcher*, 13 Eq. 128. See *Re Moore's Settlement Trusts*, 10 W. R. 315.

But a direction to divide property upon a certain event is consistent with a joint tenancy till the event happens. *Cookson v. Bingham*, 3 D. M. & G. 668, 696; *Jury v. Jury*, 9 L. R. Ir. 207.

Part or share.

And the use of the word "share," or similar words, with reference to the interest of the legatees, or even the word "participate," has the same effect. *Ive v. King*, 16 B. 46; *Paterson v. Rolland*, 28 B. 347; *Robertson v. Fraser*, 6 Ch. 696. See *Alloway v. Alloway*, 4 D. & War. 380; *Jones v. Jones*, 29 W. R. 786.

Effect of a
gift at twenty-
one.

3. And it has been held, that where there is a gift to a class when they arrive at twenty-one years or upon their becoming of age so that some may take vested and others contingent interests, they take as tenants in common. Possibly the Court in these cases read the words as to coming of age as equivalent to when they respectively come of age. *Woodgate v. Unwin*, 4 Sim. 129; *Hand v. North*, 12 W. R. 229; 10 Jur. N. S. 7; 33 L. J. Ch. 556; see *Kenworthy v. Ward*, 11 Ha. 196; *Buck*

v. *Barwise*, 6 N. R. 375; *McGregor v. McGregor*, 1 D. F. & J. 63.

Chap.
XXVIII.

4. If there are any incidents attached to the gift inconsistent with a joint tenancy, it will be construed as a tenancy in common :

Incidents inconsistent with a joint tenancy.

If, for instance, one of the objects of the gift is to take the interest of the other, not merely on the death of the latter, but on his death without issue, or on some other contingency. *Ryves v. Ryves*, 11 Eq. 539.

Of course a gift over of the interest of one joint tenant in certain events to a third person can have no such effect. *Edwards v. Jones*, 33 B. 348; see *Yarrow v. Knightly*, 8 Ch. D. 736.

5. Where there is a power to appoint to persons, which would authorise a tenancy in common, the Court, if compelled to exercise the power, will make the legatees tenants in common. *White's Trusts*, Joh. 656; *Phene's Trusts*, 5 Eq. 346; *In re Susanni's Trusts*, 47 L. J. Ch. 65; *Wilson v. Duguid*, 24 Ch. D. 244; see *Armstrong v. Armstrong*, 7 Eq. 518.

Power to appoint to persons as tenants in common.

6. It would seem, that where a clear executory trust is created by a will, for instance, by a direction to make a settlement upon a person and her children, the children would take as tenants in common. *Head v. Rundall*, 2 Y. & C. C. 231; *Stanley v. Jackman*, 23 B. 450. See *Taggart v. Taggart*, 1 Sch. & L. 84; *Synge v. Hales*, 2 Ba. & Be. 499.

Executory trust in favour of a parent and children.

At any rate, this is clearly the case if the ordinary powers and trusts are directed to be inserted in the settlement. *Mayn v. Mayn*, 5 Eq. 150.

But a mere direction to secure a fund in favour of a class will not make them tenants in common. *White v. Briggs*, 2 Ph. 583; *Owen v. Penny*, 14 Jur. 359.

7. If there is a gift to children then living and the issue of those then dead as tenants in common, or to be equally divided among children then living and the issue of those then dead, the issue in each case to take a parent's share, the issue take as joint tenants *inter se*. In these cases the words of severance occur once only and are limited to create a tenancy in common among the children and *stirpes*. *Penny v. Clarke*, 1 D. F. & J.

Issue substituted for parents take as joint tenants between themselves.

Chap.
XXVIII.

425; *McGregor v. McGregor*, 1 D. F. & J. 63; *Hodyson's Trusts*, 1 K. & J. 178; *Coe v. Bigg*, 1 N. R. 536; *Lanphier v. Buck*, 2 Dr. & Sm. 484; *In re Yates*; *Bostock v. D'Eyncourt*, (1891) 3 Ch. 53. *Shepherdson v. Dale*, 10 Jur. N. S. 156 may be taken to be overruled.

Double words
of severance
make issue
tenants in
common.

But a gift to be divided among children living at a certain date and the issue of those then dead as tenants in common creates a tenancy in common between the issue by force of the double words of severance. *Lyon v. Coward*, 15 Sim. 287; *Hodges v. Grant*, 4 Eq. 140; *In re Sophia Smith*, 58 L. J. Ch. 661; *Re Quirk*; *Quirk v. Quirk*, 61 L. T. 364; 37 W. R. 796. *Coe v. Bigg*, 1 N. R. 536, if inconsistent with this rule may be considered overruled.

Severance of
joint tenancy
as regards the
share of issue
substituted for
their parent.

8. If there is a gift to parents in joint tenancy and a direction, that the children of parents dying are to stand in the place of the parents and take their shares, there is with regard to the *stirps* of children so taking a severance of the joint tenancy. *Heasman v. Pearse*, 7 Ch. 275.

E. Tenants by entireties.

Tenants by
entireties.

Where real or personal property was before the Married Women's Property Act given to a husband and wife, though with a declaration that they were to be joint tenants, they held by entireties, and on the death of one the other took not *jure accrescendi*, but by virtue of the original limitation. Co. Lit. 187 a; *Kelly v. Pollock*, 6 Ir. C. L. 367.

Real estate.

In the case of real estate held by entireties, neither husband nor wife can alienate the property without the consent of the other, nor sever the tenancy. Co. Lit. 187 a, b; *Doe v. Parratt*, 5 T. R. 652.

Personalty.

In the case of personalty the right of the wife is destroyed, if the husband reduces the property into possession, and the wife has no equity to a settlement. *Atcheson v. Atcheson*, 11 B. 485; *Ward v. Ward*, 14 Ch. D. 506; *In re Bryan*; *Godfrey v. Bryan*, 14 Ch. D. 516.

It would seem, however, that the Court would preserve the wife's right by survivorship by preventing the husband from alienating the property during her life. *Atcheson v. Atcheson*, 11 B. 485.

In the case of chattels real held by entireties, the husband can destroy his wife's right by survivorship by alienating the chattels real. In the report of the case of *Grute v. Locroft*, Cro. El. 287, usually cited as an authority on this question, the tenancy is stated to have been joint and not by entireties. It may have been a joint tenancy created before marriage. See 2 Preston, Abst. 57; Foster on Joint Ownership, 62.

Chap.
XXVIII.
Chattels real.

Where husband and wife are tenants by entireties a decree absolute for divorce makes them joint tenants. *Thornley v. Thornley*, (1893) 2 Ch. 229. Effect of divorce.

A gift to the husband and wife by a will made after the commencement of the Married Women's Property Act, 1882, (the 1st January, 1883), creates a joint tenancy between them. *Thornley v. Thornley*, (1893) 2 Ch. 229. Married Women's Property Act.

CHAPTER XXIX.

ESTATES IN FEE AND IN TAIL.

I. WORDS OF LIMITATION PROPER TO PASS THE FEE.

Chap.
XXIX.Devise to A.
and his heirs.

1. WORDS of limitation were never necessary to pass the fee in a devise of lands held in ancient demesne. *Winch.* 1.

A devise to a man and his heirs gives him the fee, though he may be a bastard, and can have, therefore, only heirs of his body. *Idle v. Cook*, 1 P. W. 78.

Devise to A.
and his lawful
heirs.

A devise to A. and his lawful heirs carries a fee. *Simpson v. Ashworth*, 6 B. 412; *Mathews v. Gardiner*, 17 B. 254.

Devise to A.,
his executors
and adminis-
trators.

Soo, too, a devise to a man, his executors and administrators, gives him the fee. *Rose d. Vere v. Hill*, 3 Burr. 1881.

A devise of gavelkind land to a man and his eldest heir passes the fee. *Co. Lit.* 27 a.

The testator
may show
that he meant
by heirs heirs
of the body.

2. The testator may, however, show by explanatory expressions that he used the word heirs as equivalent to heirs of the body. *Doe d. Jearrod v. Banister*, 7 M. & W. 292; *Jenkins v. Hughes*, 8 H. L. 571; see, too, 4 Mad. 67; *Biddulph v. Lees*, E. B. & E. 289; 6 W. R. 592; 7 W. R. 309.

A devise to the first and other sons of a tenant for life successively and their respective heirs according to priority of birth, followed by a gift over in default of such issue, will give the sons successive estates tail. *Hennessey v. Bray*, 33 B. 96; *Lewis d. Ormond v. Waters*, 6 East, 337.

Devise to sons
in succession.

Where land was devised "to the sons in succession of A.," it was held that this was an attempt to give the sons successive estates in fee, and that the Court could mould the devise cy-près by giving them successive estates tail. *Studdert v. Von Steiglitz*, 23 L. R. Ir. 564.

Effect of gift
over in default
of heirs to a

3. Heirs both in a deed and will will be held equivalent to heirs of the body, if there is a limitation over in default of heirs or a

limitation by way of remainder to a person who may be, or to several persons some of whom may be collateral heir or heirs to the first taker, the limitation over to a collateral heir showing that by heirs the testator meant heirs of the body. *Webb v. Hearing*, Cro. Jac. 415; *Doe d. Littledale v. Smeddle*, 2 B. & Ald. 126; *Wall v. Wright*, 1 D. & Wal. 1; *Harris v. Davis*, 1 Coll. 416; *In re Smith's Estate*, 27 L. R. Ir. 121.

Chap.
XXIX.
collateral
heir.

The rule does not apply where the gift over is on failure of issue; therefore, a gift to several in fee, and if they die without issue to a collateral heir will, since the Wills Act, give a fee with an executory devise over, as it would before the Act have given an estate tail by force of the gift over being in default of issue, not because it was to a collateral heir. See *Gwynne v. Berry*, 1 R. 9 C. L. 494; *Fay v. Fay*, 5 L. R. Ir. 274.

4. If there is a devise to A., which gives A. the fee, either by express limitation or by construction, followed by a gift over if he dies without heirs of the body or issue, if these words import an indefinite failure of issue, A.'s estate is cut down to an estate tail. *Tracy v. Glover*, cit. 3 Leon. 130; *Denn v. Slater*, 5 T. R. 335; *Dansey v. Griffiths*, 4 Mau. & S. 61; *Tenny v. Agar*, 12 East, 253; *Romilly v. James*, 6 Taunt. 263; *Morgan v. Morgan*, 10 Eq. 99; see *Bowen v. Lewis*, 9 App. C. 890.

Effect of a gift
over in default
of issue upon
a prior devise
in fee.

If, however, the failure of issue is not an indefinite failure of issue, there is no necessity for this construction, and the gift over will take effect as an executory devise. *Right v. Day*, 16 East, 67; *Doe d. King v. Frost*, 3 B. & Ald. 546; *Parker v. Birks*, 1 K. & J. 156; *Ex parte Davies*, 2 Sim. N. S. 114; *Blinston v. Warburton*, 2 K. & J. 400; *McEnally v. Wetherall*, 15 Ir. C. L. 502; *Coltsmann v. Coltsmann*, L. R. 3 H. L. 121.

It appears that in a deed a limitation over upon death without such issue or without leaving issue will not cut down a previous limitation in fee to an estate tail. *Idle v. Cook*, 1 P. W. 70; *Olivant v. Wright*, 9 Ch. D. 646; see *Morgan v. Morgan*, 10 Eq. 99.

Words of limitation appear to be unnecessary even in a deed, to pass the absolute interest in an estate *pur autre vie*. *Brenan v. Boyne*, 16 Ir. Ch. 87.

Chap.
XXIX

In a devise to A., her heirs and assigns for life and after her death without issue over the words for life were rejected as inconsistent. *Wood v. Ainley*, W. N. 1884, 133.

II. WHERE THE FEE WILL PASS WITHOUT WORDS OF LIMITATION.

In what case
a fee passes
without words
of limitation
in wills before
the Wills Act.

A. Wills before the Wills Act.

In wills before the Wills Act a devise of lands to A. without words of limitation gives only an estate for life. But the Courts are anxious to lay hold of any indication of intention, that more than a life estate was meant to pass.

The words "freely to be possessed and enjoyed" will not pass the fee. *Doe d. Ashby v. Baines*, 2 C. M. & R. 23.

Devise of
property or
estate,

1. But the fee passes by the words property or estate, even if accompanied by words of locality. *Doe d. Pottow v. Fricker*, 6 Ex. 510; *Bentley v. Oldfield*, 19 B. 225; *Phillips v. Allen*, 7 Sim. 446; *White v. Coram*, 3 K. & J. 652; *Coltsmann v. Coltsmann*, L. R. 3 H. L. 121; see *Bowen v. Lewis*, 9 App. C. 890.

But the words must be found in the operative part of the devise in order to have the effect of enlarging the gift. *Doe v. Clayton*, 8 East, 141; *Burton v. White*, 1 Ex. 526; 2 Ex. 797; *Hill v. Brown*, (1894) A. C. 125.

Thus a mere recital of an intention to dispose of all the testator's estates or property is not enough to pass the fee, unless these words are brought down into and incorporated with the devise. *Denn v. Gaskin*, 2 Cowp. 657; *Doe v. Allen*, 8 T. R. 497.

moiety, part
or share.

2. So, too, the fee passes by the words moiety, part, share, or any equivalent expression capable of describing the extent and sum of the testator's interest as well as the substance of the gift. *Doe d. Atkinson v. Fawcett*, 3 C. B. 274; *Paris v. Miller*, 5 Mau. & S. 408; *Manning v. Taylor*, L. R. 1 Ex. 235; *Re De la Hunt and Pennington's Contract*, 57 L. T. 874; *Hill v. Brown*, (1894) A. C. 125.

But the moiety, part, or share must exist as such at the date of the devise. *Colclough v. Colclough*, I. R. 4 Eq. 263.

The rule does not apply to the case of a series of formal limitations, so as to affect one gift in the midst of several life estates. *Re Arnold's Estate*, 33 B. 163.

3. A fee passes, if there is a charge on the devisee personally, or in respect of the property devised, whether the charge be a sum in gross or an annual sum. *Matthews v. Windross*, 2 K. & J. 406; *Pickwell v. Spencer*, L. R. 6 Ex. 190; *ib.*, 7 Ex. 105.

Effect of a
charge upon
the devisee.

It is immaterial, whether the payment is upon a contingency or not. *Doe d. Thorne v. Phillips*, 3 B. & Ad. 753; *Abrams v. Winshup*, 3 Russ. 350.

And a fee has been held to pass, where a mere discretionary trust was imposed upon the devisee. *Lloyd v. Jackson*, L. R. 1 Q. B. 571; *ib.*, 2 Q. B. 269.

But the fee will not pass, if sums are merely charged upon the land generally and not upon the land in the hands of the devisee; thus a devise after or subject to certain payments will not carry the fee. *Moor v. Denn d. Mellor*, 1 B. & P. 558; 2 B. & P. 247; *Doe d. Sams v. Garlick*, 14 M. & W. 698; *Vick v. Sueter*, 3 E. & B. 219; *Burton v. Power*, 3 K. & J. 170.

And where there is a devise subject to a charge on a devisee without words of limitation, and another devise in exactly the same words not subject to a charge, the latter will not carry the fee. *Right d. Compton v. Compton*, 9 East, 267; *Morris v. Lloyd*, 33 L. J. Ex. 202.

An express estate for life will of course not be enlarged by a charge. *Willis v. Lucas*, 1 P. W. 472; *Doe d. Burdett v. Wrighte*, 2 B. & A. 710.

Nor will an indefinite devise, if it appears from the will that only a life estate was meant to be given. *Bolton v. Bolton*, L. R. 5 Ex. 145.

4. A fee passes, if the land is given over in a manner inconsistent with a life estate.

Gift over
inconsistent
with a life
estate.

a. Thus a fee is implied from a devise over upon death of the devisee under twenty-one, or at any other specified time. *Doe v. Cundall*, 9 East, 400; *Frogmorton v. Holiday*, 3 Burr. 1618; 1 W. Bl. 535; *Re English*, 2 Ir. C. L. 284; *Burke v. Annis*, 11 Ha. 232.

Chap.
XXIX

b. A fee is also implied, if the gift over is upon death before a certain age and without issue living at the death. *Toovey v. Bassett*, 10 East, 460; *In re Harrison's Estate*, 5 Ch. 408. See *Claridge v. Arnold*, W. N. 1880, 141; *Yarrow v. Knightly*, 8 Ch. D. 736.

It makes no difference whether the devise is vested or contingent. *In re Harrison's Estate*, *supra*.

Effect on a devise to children of a gift over if the parent dies without children.

c. It seems doubtful whether, where there is an indefinite devise to children, a mere gift over, if the parent dies without such issue, will give the children the fee. See *Doe d. Cannon v. Rucastle*, 8 C. B. 876.

But if the fee is then expressly given over, it seems the children would also take the fee. *Robinson v. Gray*, 9 East, 1; *Hutchinson v. Stephens*, 1 Kee. 240; see, too, *Re Pollard's Estate*, 3 D. J. & S. 541.

Devise of rents and profits carries the fee.

5. A devise of rents and profits or of the income of lands carried an estate for life in the lands before the Wills Act, and since the Act it carries the fee. *Mannox v. Greener*, 14 Eq. 456.

The same is the case with a devise of rents and profits for a time that may last for ever. *Bunbury v. Doran*, I. R. 9 C. L. 284.

But a devise of a specific annual sum out of land, though it happens to be the whole amount of the rents and profits, will not carry the land. *Going v. Hanlon*, I. R. 4 C. L. 144.

Exception carries as large an estate as the property out of which it is excepted.

6. Where property is excepted out of a devise in fee, the exception will carry as large an interest as the devise out of which it is excepted. *Doe d. Knott v. Lawton*, 4 Bing. N. C. 455; 6 Sc. 303; *Hill v. Ratley*, 2 J. & H. 634; *Bennett v. Bennett*, 2 Dr. & Sm. 266.

The estate of a cestui que trust is commensurate with that of the trustee.

7. The estate of a cestui qui trust is commensurate with that of his trustee, and therefore, where land is devised to a trustee and his heirs in trust for a person without words of limitation, the latter takes the fee. *Moore v. Cleghorn*, 10 B. 423; 16 L. J. Ch. 469; 17 *ib.*, 400; *Knight v. Selby*, 3 Sc. N. R. 409; 3 M. & Gr. 92; *Challenger v. Shepherd*, 8 T. R. 597; *Smith v. Smith*, 11 C. B. N. S. 121; see *In re Whiston's Settlement*; *Lovatt v. Williamson*, (1894) 1 Ch. 661.

So under a devise to trustees in fee upon trust for a life tenant with remainder in trust for a class without words of limitation, the remaindermen take the fee. *Knight v. Selby*, 3 Sc. N. R. 409 ; 3 M. & Gr. 92 ; *Maden v. Taylor*, 45 L. J. Ch. 569.

The fact that there are executory gifts over does not prevent the application of the rule, so far as the gifts over do not take effect. *Yarrow v. Knightly*, 8 Ch. D. 736.

The above rule does not apply, where the trustees take for the benefit of ulterior devisees as well. *In re Pollard's Estate*, 3 D. J. & S. 541 ; see *Sherwin v. Kenny*, 16 Ir. Ch. 138 ; *Blackhall v. Gibson*, 4 L. R. Ir. 49.

B. Now, by sect. 28 of the Wills Act, a devise without words of limitation passes the fee or other the whole estate or interest, which the testator had power to dispose of by will, unless a contrary intention shall appear by the will. Effect of the
Wills Act in
passing the
fee.

The fact, that the will contains other devises with words of limitation, will not prevent a devise without such words from passing the fee. *Wisden v. Wisden*, 2 Sm. & G. 396.

Nor will a power given to the devisee to appoint the property generally to her children cut a devise without words of limitation down to a life estate. *Brook v. Brook*, 3 Sm. & G. 280.

But a devise without words of limitation, followed by a devise of the same property to another person with words of limitation, will give the first devisee a life interest only. *Gravenor v. Watkins*, L. R. 6 C. P. 500. Contrary
intention.

III. WORDS OF LIMITATION PROPER TO PASS AN ESTATE TAIL.

Copyholds not being within the statute *de donis* are entail- Copyholds.
able only by custom. In the absence of custom a devise of
copyholds in words which would create an estate tail in free-
holds will give a fee simple conditional on the birth of issue.
Doe d. Blesard v. Simpson, 3 M. & G. 929 ; *Hardcastle v.*
Dennison, 10 C. B. N. S. 606.

A. The ordinary mode of limiting an estate tail is by the words " heirs of the body " or " issue." What words
create an
estate tail.

Chap.
XXIX

And a devise to A. and his heirs male, or to A. and his heirs lawfully begotten, is an estate tail. *Baker v. Wall*, 1 Ld. Raym. 185; *Tufnell v. Borrell*, 20 Eq. 194; *Nanfan v. Legh*, 7 Taunt. 85; *Good v. Good*, 7 E. & B. 295.

In the case of a deed such words pass a fee. Co. Lit. sec. 31.

Effect of
superadded
words of limi-
tation and
distribution.

Words of limitation superadded to the words heirs of the body will not cut down the estate tail of the ancestor. *Denn d. Gearing v. Shenton*, Cowp. 410.

Nor will such words as "the elder son of the ancestor to be preferred to the second or younger son," as they merely indicate the notion the testator incorrectly entertained of the descent of an estate tail. *Fetherston v. Fetherston*, 3 Cl. & F. 67.

And probably a devise to A. and the heirs of his body as tenants in common would give A. an estate tail, notwithstanding *Doe d. Strong v. Goff*, 11 East, 668. See 2 Bl. 55, 58; 3 J. & Lat. 54.

To create an
estate tail the
inheritance
must be
limited to the
heirs of the
body of the
ancestor.

But the heirs, where the word is to be used as a word of limitation, must be the heirs of the ancestor. Therefore a devise to the husband for life, with remainder to the heirs of the body of the husband and wife, will not give an estate tail, because no person can be supposed to include in himself the heirs of himself and somebody else. *Fearne*, C. R. 38; see, too, *Algood v. Withers*, 2 Burr. 1107.

But a devise to the husband and wife, with remainder to the heirs of the body of the husband and wife, gives them a joint estate tail. *Fearne*, C. R. 38.

Distinction
between heirs
of the body of
the wife and
heirs on the
body of the
wife begotten.

A devise to husband and wife for life, with remainder to the heirs on the body of the wife by the husband to be begotten, vests in both an estate tail; but if the remainder be limited to the heirs of the body of the wife by the husband to be begotten, the wife alone has an estate tail, the word heirs in the latter case being considered as applied to the wife only. *Alpass v. Watkins*, 8 T. R. 516; *Denn v. Gillott*, 2 T. R. 431; *Frogmorton d. Robinson v. Wharrey*, 2 W. Bl. 728.

Similarly, a devise to husband and wife for life, remainder to the heirs of the husband on the body of the wife begotten,

gives the husband an estate in special tail. *Roe d. Aistrop v. Aistrop*, 2 W. Bl. 1228.

Chap.
XXIX

It follows that a devise to the wife for life, remainder to the heirs to be begotten on the body of the wife by the husband, gives the wife no estate tail, because the heirs are not applied to her body. *Gossage v. Taylor*, Sty. 325.

Where there is a joint limitation for life to two persons who may by possibility intermarry (even though they may be respectively married already), with remainder to the heirs of their bodies, they take an estate tail. Co. Lit. 25 b. sec. 25.

Effect of
limitation
to the heirs
of the body
of several
ancestors
who may
intermarry.

So, too, a devise to a man and the heirs of his body by a second wife gives him an estate tail executed in possession, though the devisee had a wife at the time. *Fearne*, C. R. 35; Vent. 228.

And a devise to the wife for life, with remainder to the heirs of her body by the testator, where the testator has no issue by his wife, nevertheless makes the wife tenant in tail after possibility of issue extinct. *Platt v. Powles*, 2 Mau. & S. 65.

Tenant in tail
after possibi-
lity of issue
extinct.

A devise to a man or the heirs of his body is an estate tail. *Parkin v. Knight*, 15 Sim. 83; *Wright v. Wright*, 1 Ves. Sen. 409; *Harris v. Davis*, 1 Coll. 416; *Greenway v. Greenway*, 2 D. F. & J. 128.

Devise to a
man or the
heirs of his
body.

And a similar construction has sometimes been placed upon a devise to A. or his heirs, both before and since the Wills Act. See *Read v. Snell*, 2 Atk. 642, p. 645; *Lachlan v. Reynolds*, 9 Ha. 797; *Adshead v. Willetts*, 29 B. 358.

Construction
of a devise to
a man or his
heirs.

Such a devise would, however, probably now be held to be substitutional in wills since the Wills Act, as it is no longer necessary to change "or" into "and," in order to give the devisee the fee. *Wingfield v. Wingfield*, 9 Ch. D. 658. See *Parsons v. Parsons*, 8 Eq. 260.

B. In some cases the word heir has been held equivalent to heir of the body, where there has been a direction, that the land shall descend to the heirs; as, for instance, where there was a devise to A. for life, and then to descend to his female heir, whether sister or daughter. *Lewthwaite v. Thompson*, 36 L. T. N. S. 910; *Fay v. Fay*, 5 L. R. Ir. 274; see *Re Score*; *Tolman v. Score*, 57 L. T. 40.

Chap.
XXIX.

Construction
of devises to a
man and his
issue.

C. With regard to realty, "the word issue in a will *primæ facie* means the same thing as heirs of the body, and is to be construed as a word of limitation." Per Parke, B., in *Slater v. Dangerfield*, 15 M. & W. 263.

Thus a devise to A. and his issue, or to several and their issue, as tenants in common, would, it seems, give estates tail. *Martin v. Suannell*, 2 B. 249; *Beaver v. Nowell*, 25 B. 551; *Campbell v. Bouskell*, 27 B. 325.

A devise to A. and his issue living at his death has been held to give an estate tail. *University of Oxford v. Clifton*, 1 Ed. 473.

A devise to A. and his issue, and the heirs of such issue, with a gift over in default of issue, before the Wills Act, has the same effect. *Franklin v. Lay*, 6 Mod. 258; 2 Bl. 59 n.

Effect of
words of
distribution
applied to the
issue only.

But a devise to A. and his issue as tenants in common, if more than one, the tenancy in common being applied to the issue only, or to A. and his issue to be divided among them as A. should appoint, where there are words to carry the fee, gives A. an estate for life, with remainder to his issue in fee. *Doe d. Gilman v. Elvey*, 4 East, 313; *Hockley v. Mawbey*, 1 Ves. Jun. 142. In *Doe d. Davy v. Burnsall*, 6 T. R. 30; 1 B. & P. 215, the word issue was explained to mean children by the gift over, if such issue died without issue.

The rule in
Wild's Case
applies to a
limitation to
a man and his
issue in fee
as tenants
in common.

And a devise to several and their issue and their heirs as tenants in common gives an estate tail, according to the rule in *Wild's Case (post)*, if there are no issue at the date of the devise. *Underhill v. Roden*, 2 Ch. D. 494; Co. Lit. 9 a. See *Cancellor v. Cancellor*, 11 W. R. 16.

IV. WORDS OCCASIONALLY USED AS WORDS OF LIMITATION.

Words son
and child used
as words of
limitation.

A. The words son and child may be used as words of limitation, if the testator has clearly shown his intention so to use them. "If the word son be not used as a *designatio personæ*, but with a view to the whole class, or as comprising the whole of the male descendants severally and successively, then it is

the manifest intention of the testator to give an estate tail." *Mellish v. Mellish*, 2 B. & C. 520.

Chap.
XXIX.

Thus, if the devise is to A., or to A. for life, and if he dies not having a son over, A. takes an estate in tail male in a case before the Wills Act. *Bifield's Case*, cited 1 Vent. 231; S. C. *sub nom. Milliner v. Robinson*, 1 Moore, 682; pl. 939; *Re Bird and Barnard's Contract*, 59 L. T. 166.

The same is the case if the devise be to A. for life, and then to his son if he has one, and in default of such issue over. *Robinson v. Robinson*, 1 Burr. 38; 2 Ves. Sen. 225; 3 Atk. 736; *Mellish v. Mellish*, 2 B. & C. 520; *Doe d. Garrod v. Garrod*, 2 B. & Ad. 87; *Murphy v. Johnston*, 6 Ir. Ch. 230; *Bell v. Bell*, 15 Ir. Ch. 517; *Andrew v. Andrew*, 1 Ch. D. 410; see *Bowen v. Lewis*, 9 App. C. 890.

But a devise to A. for life, and then to such son as she may leave, and his heirs and assigns, goes to all the sons of A. as joint tenants. *Beauchant v. Usticke*, W. N. 1880, 14.

B. The term "eldest son" is less susceptible of a collective meaning than son or child. But it will receive this meaning if the intention is clear. *Doe d. Burrin v. Chorlton*, 1 Scott N. R. 290; 1 M. & Gr. 429; *Lewis v. Puxley*, 16 M. & W. 733; *Cleary's Trust*, 16 Ir. Ch. 438; *In re Childe*; *Childe-Pemberton v. Childe*, W. N. 1883, 48.

Eldest son.

And if the devise is to A. for life, then to his eldest son for life, and so on to the eldest son of the family, an estate tail in remainder will be given to A., and not to his eldest son, so as to take in the largest number of descendants. *Forsbrook v. Forsbrook*, L. R. 3 Ch. 93.

As between an estate tail in the father or son the Court prefers the former.

C. In the same way the word children may be a word of limitation.

1. Thus a devise to A. to hold to him and his children for ever, or to A. and his children for ever, or to A. and his children lawfully begotten for ever, gives A. an estate tail. *Davie v. Stevens*, Dougl. 321; *Broadhurst v. Morris*, 2 B. & Ad. 1; *Wood v. Baron*, 1 East, 259; *Roper v. Roper*, L. R. 3 C. P. 32; 36 L. J. C. P. 27; 37 *ib.* 7. See, too, *Doe d. Gigg v. Bradley*, 16 East, 399.

Children used as a word of limitation.

In such cases children would seem to be a word of limitation

Chap.
XXIX.

quite independently of the so-called rule in *Wild's Case*, 6 Rep. 17.

Devise to A.
and
children in
succession.

So a devise of all the testator's property to A. and his children in succession gives A. an estate tail. *Earl of Tyrone v. Marquis of Waterford*, 1 D. F. & J. 613; see *Snowball v. Proctor*, 2 Y. & C. C. 478.

Rule in
Wild's Case.

2. A simple devise to A. and his children, where A. has no children at the time of the devise, gives him an estate tail. *Wild's Case*, 6 Rep. 17; *Clifford v. Koe*, 5 App. C. 447.

And for this purpose a child *en ventre* at the date of the will is considered as non-existent. *Roper v. Roper*, L. R. 3 C. P. 32.

Power to
appoint the
property to
children is not
inconsistent
with an estate
tail.

The rule applies, though the testator may expressly give the parent a power of appointing the property in question among his children. *Seale v. Barter*, 2 B. & P. 485; *Clifford v. Brooke*, 1 R. 10 C. L. 179; 2 L. R. Ir. 184; S. C. nom. *Clifford v. Koe*, 5 App. C. 447. See *In re Moyle's Estate*, 1 L. R. Ir. 155.

Exceptions.

3. There may, however, be an intention shown that the parent was not to take an estate tail.

Thus, in *Buffar v. Bradford*, 2 Atk. 220, the testator showed that he contemplated the mother and children as taking joint interests at a period subsequent to his death. And in *Grieve v. Grieve*, 4 Eq. 180, where there was a devise of a house to the testator's nieces and their children, and if they have not any over, a direction that the furniture was to go with the house was held sufficient to show that an estate tail could not have been intended.

If there are
children living
at the date of
the devise
children is
prima facie
not a word of
limitation.

4. If there are any children living at the time of the devise, the term children is *prima facie* not a word of limitation. *Byng v. Byng*, 10 H. L. 171; *Oates d. Hatterly v. Jackson*, 2 Str. 1172; *Jeffery v. Honeywood*, 4 Mad. 398.

Contrary
intention.

But this rule bends to evidence of a contrary intention; thus, a direction that certain things are to go as heirlooms with the estate, is sufficient to rebut a joint tenancy, and to show that an estate tail was intended to be given. *Byng v. Byng*, 10 H. L. 171.

By analogy to the rule in *Wild's Case* a devise to A. and his sons in tail male, and for want of such issue male over, where A. has no sons, gives him an estate tail. *Wharton v. Gresham*, 2 W. Bl. 1083; see *Sparling v. Parker*, 29 B. 450.

Chap.
XXIX.

A devise to A. and B. as tenants in common, and in their respective proportions to their children, or according to their wills, gives the fee to A. & B. with an executory devise at the death of each to his children or devisees. *Re Buckmaster's Estate*, 47 L. T. 514.

The rule in *Wild's Case* does not apply to personality. *Audsley v. Horn*, 26 B. 195; 1 D. F. & J. 226.

The rule in
Wild's Case
does not apply
to personality.

V. THE RULE IN SHELLEY'S CASE.

The construction of devises to heir and heirs of the body, after a prior estate of freehold in the ancestor, is governed by the so-called rule in *Shelley's Case*.

It may be laid down generally, that where the ancestor by any will takes an estate of freehold, whether by implication or direct limitation, and whether it may or may not determine in his lifetime, and in the same will an estate is limited by way of remainder, either mediately or immediately, to his heirs or the heirs of his body, in such case the heirs are always words of limitation of the estate and not words of purchase, and therefore the ancestor takes an estate in fee or in tail as the case may be. *Shelley's Case*, 1 Rep. 93 b.; *Fearne C. R.* 33, 40; *Pybus v. Mitford*, 1 Ventr. 372; *Curtis v. Price*, 12 Ves. 99.

The rule in
Shelley's Case
stated.

The two limitations must be in the same instrument, but the Court considers a will and codicils for this purpose as one instrument. *Hayes d. Foorde v. Foorde*, 2 W. Bl. 698.

The rule applies equally to limitations of freehold and copyhold estates, and to estates *pur autre vie*. *Doe d. Jeff v. Robinson*, 8 B. & C. 296; 2 M. & Ryl. 249; see 2 D. & War. 327; *Crozier v. Crozier*, 3 D. & War. 373.

It applies to limitations, which are both legal or both equitable, even where the first is for the separate use of a married woman. *Spence v. Spence*, 12 C. B. N. S. 199; *Fearne, C. R.* 56; *Pitt v. Jackson*, 2 B. C. C. 51.

Chap.
XXIX.

It does not apply to cases, where one limitation is legal and the other equitable. *Right v. Creber*, 5 B. & C. 866; *Collier v. McBean*, 34 L. J. Ch. 555.

The rule does not apply so as to destroy intermediate contingent limitations by merger, even in cases before 8 & 9 Vict. c. 106. *Lewis Bowles' Case*, 11 Rep. 80; *Fearne C. R.* 36.

Nor does it apply where the estate to the heir is limited, not by way of remainder, but by way of executory devise. *Lloyd v. Carew*, Prec. Ch. 72; *Show P. C.* 137; see *Fearne*, 275; *Plunket v. Holmes*, 1 Lev. 11; *Raym.* 28; *Fearne*, 341; *Crofts v. Middleton*, 2 K. & J. 194; 8 D. M. & G. 192; see *In re White & Hindle's Contract*, 7 Ch. D. 201; *Richardson v. Harrison*, 16 Q. B. D. 85.

Application of the rule where the limitation is to the heirs or the heirs of the body of the ancestor.

The rules of construction with reference to cases coming within the operation of the rule in *Shelley's Case* are settled by the leading cases of *Jesson v. Wright*, 2 Bl. 1, and *Roddy v. Fitzgerald*, 6 H. L. 823.

A. Where the words heir or heirs of the body are used in the limitation of the inheritance the rule applies—

1. Although the limitation of the freehold to the ancestor may be followed by words clearly indicating an intention that his estate is to be for life only.

Restrictions upon the estate of the ancestor are immaterial.

Thus, it is immaterial, that the estate of the ancestor may be declared to be "for life and no longer:" *Roe d. Thong v. Bedford*, 4 Mau. & S. 362; 1 B. C. C. 313; *Robinson v. Robinson*, 1 Burr. 38; 3 B. P. C. 180; 2 Ves. Sen. 225; *Macnamara v. Dillon*, 11 L. R. Ir. 29; that he is made unimpeachable for waste: *Jones v. Morgan*, 1 B. C. C. 206; *Bennett v. Earl of Tankerville*, 19 Ves. 170; that powers are expressly given him which would be implied if he were tenant in tail, such as powers to jointure and make leases: *R. v. Melling*, 1 Vent. 225; *Baile v. Coleman*, 2 Vern. 668; *Jones v. Morgan*, 1 B. C. C. 206; *Broughton v. Langley*, 2 Ld. Raym. 873; that his estate is made subject to the obligation of keeping the buildings in repair: *Jesson v. Wright*, 2 Bl. 1; that there is a restraint upon alienation for longer than his life: *Perrin v. Blake*, 1 W. Bl. 672; *Hayes d. Foorde v. Foorde*, 2 W. Bl. 698; that, where there is no executory trust, there is a declaration

that special care should be taken that it should never be in the power of the ancestor to dock the entail: *Leonard v. Earl of Sussex*, 2 Vern. 526; and that there is a limitation to trustees to preserve contingent remainders. *Wright v. Pearson*, Amb. 358; 1 Ed. 119.

2. The rule applies, where words of limitation are superadded to the limitation to the heirs or heirs of the body, provided such words are not inconsistent with the nature of the descent pointed out by the first words, for such words may be looked upon as an explanation of what the testator supposed to be the course of the descent under an estate tail, and *expressio eorum quæ tacite insunt nihil operatur*.

Words of limitation superadded to the word heirs will not make it a word of purchase.

Thus, words limiting the estate of the heirs to a life estate, or to a life estate without power to sell or dispose, will be rejected. *Doe d. Elton v. Stenlake*, 12 East, 515; *Hugo v. Williams*, 14 Eq. 224; *Hayes d. Foorde v. Foorde*, 2 W. Bl. 698.

The same will be the case with words of limitation in fee or in tail, superadded to the word heirs or heirs of the body.

Thus a limitation to the heirs of the body of the ancestor and their heirs, or their heirs, executors, administrators, and assigns for ever (a); or to the heirs male of the body of the ancestor, and their issue (b); or to the heirs male of his body in tail, in strict settlement (c); or to the heirs male of his body, and the heirs male of the body of every such heir male severally and successively as they should be in priority of birth, every elder, and the heirs male of his body, to be preferred to every younger (d), will not avail to give the heirs an estate by purchase. *Morris d. Andrews v. Le Gay*, cited 2 Burr. 1103, and 8 T. R. 518; *Kinch v. Ward*, 2 S. & St. 409; *Measure v. Gee* 5 B. & Ald. 910; *Nash v. Coates*, 3 B. & Ad. 839 (a); *Minshull v. Minshull*, 1 Atk. 411 (b); *Douglas v. Congreve*, 1 B. 59 (c); *Legatt v. Sewell*, 1 Eq. Ab. 395, p. 7; 1 P. W. 37; see *Fearne*, 159, 160; see *Fetherston v. Fetherston*, 3 Cl. & F. 67; 9 Bl. 237 (d).

3. Words of distribution following the limitation of the inheritance will not prevent the application of the rule, "for it does not follow that the testator did not intend that heirs of

Words of distribution superadded.

Chap.
XXIX

the body should take because they could not take in the mode prescribed."

Thus a declaration that the heirs are to take as tenants in common, and not as joint tenants (*a*); or equally among them, share and share alike (*b*); or in such shares and proportions as the ancestor should appoint (*c*); or "as well male as female," or "whether sons or daughters" as tenants in common (*d*), will not prevent the operation of the rule. *Doe d. Candler v. Smith*, 7 T. R. 531; *Bennett v. Earl of Tankerville*, 19 Ves. 170 (*a*); *Doe d. Atkinson v. Featherstone*, 1 B. & Ad. 944 (*b*); *Jesson v. Wright*, 2 Bl. 1; see *Roddy v. Fitzgerald*, 6 H. L. 823; *Dunk v. Fenner*, 2 R. & M. 557 (*c*); *Doe d. Bosnall v. Harvey*, 4 B. & C. 610; *Pierson v. Vickers*, 5 East, 548 (*d*).

Gavelkind
lands.

In such a case it makes no difference that the lands are gavelkind. *Doe d. Bosnall v. Harvey*, *supra*, overruling *Doe v. Laming*, 2 Burr. 1100.

The absence of a gift over in default of issue is immaterial. *Doe d. Atkinson v. Featherstone*, 1 B. & Ad. 944.

Words of dis-
tribution and
limitation
superadded.

4. Nor will words of distribution and limitation together, superadded to the limitation of the inheritance, prevent the operation of the rule.

It has sometimes been laid down that words of distribution and limitation together, superadded to the heirs, would make the latter a word of purchase, but the rule is now clearly settled, overruling *Gretton v. Haward*, 6 Taunt. 94; 2 Marsh. 9, and *Crump d. Woolley v. Norwood*, 7 Taunt. 362; 2 Marsh. 161; see *Anderson v. Anderson*, 30 B. 209; *Mills v. Seward*, 1 J. & H. 733; *Grimson v. Downing*, 4 Dr. 125; and see *Jordan v. Adams*, 9 C. B. N. S. 483.

Lord Chief Justice Cockburn, in the last cited case, p. 497, thus sums up the law with reference to the extent of the application of the rule in *Shelley's Case*, where the words heirs or heirs of the body are used: "No incident, superadded to the estate for life, however clearly showing that an estate for life merely, and not an estate of inheritance, was intended to be given to the first donee, nor any modification of the estate given to the heirs, however plainly inconsistent with an estate of inheritance, nor any declaration, however express or emphatic,

of the devisor, can be allowed, either by inference or by force of express direction, to qualify or abridge the estate in fee or in tail, as the case may be, into which, upon a gift to a man for life, with remainder to his heirs or the heirs of his body, the law inexorably converts the entire devise in favour of the ancestor."

Chap.
XXX

The words heirs or heirs of the body will, however, be construed as words of purchase :

1. When words of limitation are superadded to them inconsistent with the nature of the descent pointed out by the first words, as where the limitation is to a man for life, and after his decease to the use of his heirs and the heirs female of their bodies. *Fearne*, C. R. 182; *Shelley's Case*, 1 Rep. 88, 95 b.

Words of limitation inconsistent with the descent of an estate tail in the ancestor.

There appears to be no other authority for this rule than the argument of counsel in *Shelley's Case*, cited with approbation by *Fearne*, C. R., p. 182. It has, however, been followed in a case where the word issue and not heir was used. See *Hamilton v. West*, 10 Ir. Eq. 75. In that case the devise was to Margaret for life, remainder to her issue female and the heirs of their bodies; and it was held that Margaret took only a life estate, with remainder to her daughters in tail general, and there seems no reason for supposing, that the same principle would not be applied, where the word heirs instead of issue is used. See *Dodds v. Dodds*, 10 Ir. Ch. 476; 11 *ib.* 374.

In the absence of authority it is doubtful, what amount of discrepancy between the two courses of descent will justify the application of this rule. *Fearne*, C. R., p. 183, points out that "there does not appear to be the same inconsistency in construing the first words, which describe heirs special, to be words of limitation, where the superadded words extend to heirs general, as there is where the first words, and those engrafted on them, distinguish two different incompatible courses of descent, and would not carry the estate to the same person; in the latter case it is absolutely impossible, by any implied qualification, to reconcile the superadded words to those preceding them, so as to satisfy both by construing the first as words of limitation; whereas, in the former case, the superadded words are not contrary to or incompatible with the preceding, but in their

What is an inconsistent course of descent.

Chap.
XXIX

general sense include them; and there is no improbability in the supposition that they were used by the testator in the same qualified sense as the preceding; and then both may be satisfied, by taking the first as words of limitation." In *Hamilton v. West*, however, the question was between an estate in tail female in the ancestor and an estate in tail general in the daughters, the latter of which would, "in their general sense," have included the former; and it seems, therefore, that Fearn's remark must be taken with some modification.

The testator may interpret the sense in which he has used the word heirs.

2. Where the testator has, either by express words, or by implication, interpreted the meaning he intended to convey by the term heirs or heirs of the body, those words may be words of purchase.

In *Fetherston v. Fetherston*, 3 Cl. & F. 67, Lord Brougham lays down, "If there is a gift to A. and the heirs of his body, and then in continuation, the testator, referring to what he had said, plainly tells us that he used the word heirs of the body to denote A.'s first or other sons, then clearly the first taker would only take a life estate."

Effect of the words "if more than one child, to such child."

However, the mere insertion of such words as, if more than one child, or, if only one child, then to such child, is not sufficient to show that the testator meant by heirs of the body, children. *Roddy v. Fitzgerald*, 6 H. L. 823; *Jesson v. Wright*, 2 Bl. 1.

Effect of the words "if more than one such child," &c.

And even if the words are, if there be but one *such* child, to such child, his or her heirs for ever, the term heirs of the body will not be held to mean children, if there are no words to carry the fee to them, except in the event of there being only one child. *Bridge v. Chapman*, Notes of Cases, L. J., July 10, 1875, 118; see *Ryan v. Cowley*, Ll. & G. t. Sug. 7.

But in similar cases heirs of the body will be construed as children, if there are words giving them an estate in fee or in tail. *Goodtitle d. Sweet v. Herring*, 1 East, 264; *Gummoe v. Howes*, 23 B. 184. In *Poole v. Poole*, 3 B. & P. 620, this construction was rebutted by other limitations.

Express interpretation clause.

So, if the testator, after using the words heirs of the body, continues, "that is to say, the first, second, and other sons, etc." *Lowe v. Davies*, 2 Ld. Raym. 1561.

Or again, the testator may explain his meaning by reference to other limitations. *Meredith v. Meredith*, 10 East, 503; *Doe d. Woodall v. Woodall*, 3 C. B. 349; *East v. Twyford*, 4 H. L. 517.

Chap.
XXIX
Interpretation
by reference.

And the words heirs of the body, coupled with a reference to the ancestor as their father, must mean children. *Jordan v. Adams*, 9 C. B. N. S. 483.

Reference to
father.

B. The application of the rule in *Shelley's Case* is the same, where the words are first heirs male or heirs of the body who shall attain twenty-one. *Minshull v. Minshull*, 1 Atk. 411; *Toller v. Attwood*, 15 Q. B. 929.

First heirs
male.

C. When the word heir is used in the singular, the rules of law are less stringent in uniting the limitation of the inheritance to the estate for life of the ancestor.

Limitation to
the heir of the
tenant for life.

1. However, the word heir, in the singular, without words of limitation superadded, is a word of limitation and not of purchase, even when such words as "next" or "first" are added to it. *Blackburn v. Stables*, 2 V. & B. 367; *Burley's Case*, cit. 1 Vent. 230; *Whiting v. Wilkins*, 1 Bulst. 219; *Richards v. Lady Bergavenny*, 2 Vern. 324; *White v. Collins*, Com. Rep. 289; *Dubber d. Trollope v. Trollope*, Ambl. 453.

The fact that the limitation is to the heir for ever makes no difference. *Fuller v. Chamier*, L. R. 2 Eq. 682.

2. But words of limitation in fee or in tail, superadded to the word heir, make it a word of purchase. *Archer's Case*, 1 Rep. 66; *Fearne*, C. R. 150; *Clerke v. Day*, Moore, 593; *Willis v. Hiscox*, 4 M. & Cr. 197; *Greaves v. Simpson*, 12 W. R. 773; 10 Jur. N. S. 609.

Words of
limitation
superadded to
the word heir.

And even a devise to A. to hold to him and the heir male of his body, and the heirs and assigns of such heir male for ever, followed by a gift over, if A. died without leaving any son of his body, has been held to give A. a life estate only. *Chamberlayne v. Chamberlayne*, 6 E. & B. 625.

Where by deed land was conveyed to the use of A. during his life without impeachment of waste, with an ultimate limitation to the use of "such person or persons as at the decease of the said A. shall be his heir or heirs at law, and of the heirs and assigns of such person or persons," it was held that A.'s

Chap.
XXIX

heir at law took by purchase. *Evans v. Evans*, (1892) 2 Ch. 173.

3. Where the estate of the heir is expressed to be for life, inasmuch as he is not to have the inheritance, he cannot take as heir by descent. *White v. Collins*, Com. 289; *Pedder v. Hunt*, 18 Q. B. D. 565.

The rule in *Shelley's Case* applies where the limitation is to the issue of a tenant for life.

D. The application of the rule in *Shelley's Case*, where the limitation is to the issue of the ancestor, who takes a prior estate of freehold :

The word issue, whether used in a will before or since the Wills Act, is *prima facie* a word of limitation ; the rule in *Shelley's Case* applies, therefore, where the limitation in remainder is to the issue of the ancestor. *R. v. Melling*, 1 Vent. 225 ; *Roddy v. Fitzgerald*, 6 H. L. C. 872 ; *Sandes v. Cooke*, 21 L. R. Ir. 445.

Distinction between the word issue and heirs.

But though this is the *prima facie* meaning of issue, "the authorities clearly show that, whatever be the *prima facie* meaning of the word issue, it will yield to the intention of the testator to be collected from the will, and that it requires a less demonstrative context to show such intention than the technical expression heirs of the body would do." *Per Alderson, B., Lees v. Mosley*, 1 Y. & C. Ex. 609.

This doctrine was questioned by Lord Wensleydale in *Roddy v. Fitzgerald*, 6 H. L. 882 :—"I certainly feel a difficulty in figuring to myself, what precise sort of context would be sufficient to alter the sense of the word issue, which would not have the same effect, if the words used were the admitted technical words, heirs of the body." There can, however, be no doubt that words of modification will more readily convert the word issue than the word heirs into a word of purchase, and the remark of Lord Wensleydale must be held to apply to cases where other words have interpreted the word issue to mean children. Thus :

Words of distribution alone superadded in cases before the Wills Act.

1. Words of distribution alone, superadded to the word issue, in cases where the issue would not take the inheritance, will not make it a word of purchase. *Doe d. Blandford v. Applin*, 4 T. R. 82 ; *Doe d. Cock v. Cooper*, 1 East, 229 ; *Roddy v. Fitzgerald*, 6 H. L. 823 ; *Colclough v. Colclough*, 1 R. 4 Eq.

263; *Woodhouse v. Herrick*, 1 K. & J. 352; *Blackhall v. Gibson*, 2 L. R. Ir. 49.

Chap.
XXIX

This is clear, when there is a gift over upon an indefinite failure of issue; but it seems, that a gift over is immaterial, since, under the old law, the issue, if they took as purchasers, could only take for life, and therefore the testator's general intent to benefit all the issue would fail. See *per* Wood, V.-C., in *Kavanagh v. Morland*, Kay, 16, 27, where the same construction prevailed, although the gift over was in default of issue of the tenant for life living at his death; and this is in accordance with *Doe d. Cannon v. Rucastle*, 8 C. B. 876.

2. Words of limitation in fee or in tail, superadded to the word issue, where there is a limitation in default of issue in cases before the Wills Act, will not make it a word of purchase, provided they do not change the course of descent. *Roe d. Dodson v. Grew*, 2 Wils. 324; Wilm. 272; *Denn d. Webb v. Puckey*, 5 T. R. 299; *Frank v. Stovin*, 3 East, 548; *Griffiths v. Evan*, 5 B. 241.

Words of
limitation
superadded.

The same rule applies where the gift over is on failure of issue living at the death of the person, to whom the prior estate is limited, or on death of the issue under twenty-one. *Warren v. Travers*, 1 R. 2 Eq. 455; see *Fetherston v. Fetherston*, 3 Cl. & F. 67; 9 Bli. 237. *Merest v. James*, 1 B. & B. 484; 4 J. B. Moo. 327, must be considered over-ruled.

And the absence of a gift over in default of issue will not convert issue into a word of purchase. *Williams v. Williams*, 51 L. T. 779; see, too, *Doe d. Cooper v. Collis*, 4 T. R. 294; and the remarks of Wood, V.-C., Kay, 16, 27; and see *Montgomery v. Montgomery*, 3 J. & Lat. 47; *Morgan v. Thomas*, 8 Q. B. D. 575; 9 Q. B. D. 643.

Effect of the
absence of a
gift over in
default of
issue.

3. If, however, the superadded words of limitation alter the course of descent, the issue will take as purchasers. *Hamilton v. West*, 10 Ir. Eq. 75; *Dodds v. Dodds*, 10 Ir. Ch. 476; 11 *ib.* 374, *ante*, pp. 351, 352.

4. Words of limitation in fee or in tail, and of distribution, superadded to the word issue, make it a word of purchase, whether there is a limitation over in default of issue or not.

Words of
limitation and
distribution
superadded
make issue

Chap.
XXIX.
—
a word of
purchase.

Lees v. Mosley, 1 Y. & C. Ex. 589; *Crozier v. Crozier*, 3 D. & War. 373; *Greenwood v. Rothwell*, 5 M. & Gr. 628; 6 Sc. N.R. 670; *Montgomery v. Montgomery*, 3 J. & Lat. 47; *Slater v. Dangerfield*, 15 M. & W. 263; *Colclough v. Colclough*, 1 R. 4 Eq. 263; *McKenna v. Eager*, 1 R. 9 C. L. 79; *Rotheram v. Rotheram*, 13 L. R. Ir. 429; *Shannon v. Good*, 15 L. R. Ir. 284.

It makes no difference, whether a fee be given to the issue by express words or by implication from a power of appointing to them. *Bradley v. Cartwright*, L. R. 2 C. P. 511; *Whitelaw v. Whitelaw*, 5 L. R. Ir. 120.

But a power of appointing to issue, which would authorise an appointment in fee, will not make the word issue a word of purchase, where there is an express gift to issue as tenants in common without words giving them the fee. *Blackhall v. Gibson*, 2 L. R. Ir. 49.

Devise to M.
for life and her
issue since
Wills Act.

5. A devise to M. for her life and to her lawful begotten issue, in a will since the Wills Act, followed by a gift over in the event of her leaving none, gives M. an estate tail. *Sandes v. Cooke*, 21 L. R. Ir. 445.

Effect of a
restraint upon
alienation by
the tenant for
life and his
issue or any of
them.

6. In *King v. Burchell*, Amb. 379; 4 T. R. 226 n, a direction against alienation by the tenant for life and his issue, or any of them, was held to show that the word issue was used as a word of limitation. See, too, *Tate v. Clarke*, 1 B. 100.

CHAPTER XXX.

ESTATES OF TRUSTEES.

I. IN WHAT CASES TRUSTEES TAKE THE LEGAL ESTATE.

THE appointment of certain persons as trustees of inheritance gives them the fee. *Trent v. Hanning*, 1 B. & P. N. R. 116; 7 East, 97; 10 Ves. 495; 1 Dow, 102. Chap. XXX.
Appointment
of trustees of
inheritance.

So the appointment of a person as executor, "so far as is necessary to the performance of the trusts relating to my real estate," gives the executor the fee. *Plenty v. West*, 6 C. B. 201; 16 B. 175; *Sidebotham v. Watson*, 11 Ha. 170; see *Oates v. Cooke*, 3 Burr. 1684; *Doe d. Gillard v. Gillard*, 5 B. & Ald. 785.

If the land is devised to beneficiaries, and a share is directed to be divided on the death of a beneficiary, persons appointed to carry out all the intentions of the will will take the legal estate, though the case may be different where a sale is only contemplated as possible. *Davies to Jones and Evans*, 24 Ch. D. 190; *L. & S. W. R. Co. v. Bridger*, 12 W. R. 948.

Where land is devised to three trustees, and the appointment of one of the trustees is revoked, and another is appointed in his place, the fee passes to the new trustee jointly with the two remaining trustees. *Re Hough's Will*, 4 De G. & S. 371; *Re Turner*, 30 L. J. Ch. 144; 9 W. R. 174; 2 D. F. & J. 527. Appointment
of new trustee
by codicil.

A direction to executors to let the testator's lands, and out of the profits to pay two sums, followed by a gift of the rents of the land, gives the executors no estate beyond the period for accomplishing the purpose indicated. *Lambert v. Browne*, 1 R. 5 C. L. 218. See *Smith v. Smith*, 1 L. R. Ir. 206.

A direction to executors to pay annuities out of the testator's whole estate, which is disposed of after payment of the annuities, gives the executors the fee. *Doe v. Woodhouse*, 4 T. R. 89. Direction to
pay annuities
out of realty.

Chap. XXX.

Effect of the
Statute of
Uses on
devises to
trustees.

A devise unto and to the use of A., in trust for B., gives A. the legal estate by analogy to the Statute of Uses; while, similarly, a devise to A., in trust for B., gives B. the legal estate. See *Cunliffe v. Brancker*, 3 Ch. D. 393.

In the latter case it makes no difference that the devise to the trustees is subject to payment of debts, if the duty of paying them is not imposed on the trustees. *Kenrick v. Lord Beauclerk*, 3 B. & P. 178; *Jones v. Lord Say*, 8 Vin. 262, pl. 19.

But the legal estate will remain in the trustees, if it is necessary for the performance of the trust imposed upon them.

Devise in
trust to pay
rents.

Thus, a devise to trustees and their heirs in trust to pay the rents to B. gives the trustees the legal estate. *Doe v. Homfray*, 6 A. & E. 206.

Devise to
permit *cestui*
que trust to
receive rents.

But a devise to trustees to permit B. to receive the rents vests the legal estate in B. *Right d. Phillips v. Smith*, 12 East, 455; *Doe d. Noble v. Bolton*, 11 Ad. & E. 188.

Devise to pay
to or permit
cestui que trust
to receive
rents.

And, similarly, if the trust is to pay to or permit B. to receive the rents, the latter direction takes effect and the legal estate vests in B. *Doe v. Biggs*, 2 Taunt. 109; *Baker v. White*, 20 Eq. 166; *Re Allsop and Joy's Contract*, 61 L. T. 213; see *In re Lashmar*; *Moody v. Penfold*, (1891) 1 Ch. 258.

Net rents.

But if the beneficiaries are to receive only the net profits, the trustees take the legal estate. *Barker v. Greenwood*, 4 M. & W. 421.

Separate use.

If the trust is to permit a married woman to receive the rents to her separate use, the legal estate remains in the trustees. *Harton v. Harton*, 7 T. R. 652; *In re Hart's Estate*; *Orford v. Hart*, W. N. 1883, 164. But this principle does not apply to a deed. *Williams v. Waters*, 14 M. & W. 166.

Trustees to
preserve
contingent
remainders.

If the trustees are to preserve contingent remainders during the life of the tenant for life, a trust to permit the latter to receive the rents will not give him the legal estate. *Biscoe v. Perkins*, 1 V. & B. 485.

Effect of a
power to give
receipts on the
legal estate.

And it would seem, that a power to the trustees to give receipts would show that they were to receive the rents and pay them over to the beneficiaries, notwithstanding the trust is to permit the beneficiaries to receive them. But a receipt

clause will not have this effect if copyholds are given with the freeholds, since it may be limited to the former, to which the Statute of Uses does not apply. *Baker v. White*, 20 Eq. 166. Chap. XXX.

If the receipts of the beneficiary are to be with the approbation of the trustees, they take the legal estate. *Gregory v. Henderson*, 4 Taunt. 772.

The fact that no sufficient estate is limited to support contingent remainders will not prevent the uses from being legal. *Cunliffe v. Brancker*, 3 Ch. D. 393.

If there is a devise in remainder to children who shall attain twenty-one, a power of maintenance given to the trustees will prevent the use in remainder from becoming legal. *Berry v. Berry*, 7 Ch. D. 657; *In re Tanqueray-Willlaume and Landau*, 20 Ch. D. 465; see *In re Bourne*; *Rymer v. Harpley*, 56 L. J. Ch. 566; 56 L. T. 388; 35 W. R. 359.

A devise to trustees upon trust to pay debts and legacies vests the legal estate in them at once, whether the personalty is sufficient for that purpose or not. *Murthwaite v. Jenkinson*, 2 B. & C. 357; 3 D. & Ry. 765. Trust to pay debts and legacies.

On the other hand, if the trust is to pay the debts out of the realty only if the personalty proves deficient, the trustees take the legal estate, only if the event happens. *Carlyon v. Truscott*, 20 Eq. 339. See *Doe d. Cadogan v. Ewart*, 7 A. & E. 636. Trust to arise only if the personalty is insufficient.

If there is a general direction to pay debts whereby the debts are charged upon the lands of the testator, followed by a devise of the lands to trustees and their heirs to certain uses, the legal estate remains in the trustees. *Houston v. Hughes*, 6 B. & C. 403; *Baker v. White*, 20 Eq. 166, 173; *In re Brooke*; *Brooke v. Brooke*, (1894) 1 Ch. 43.

The Statute of Uses does not apply to leaseholds for years or to copyholds, and therefore a devise of copyholds to A., in trust for B., gives A. the legal estate. *Houston v. Hughes*, *supra*; *Baker v. White*, *supra*. Leaseholds for years and copyholds are not within the Statute of Uses.

There is no so-called doctrine of attraction by which, where freeholds and copyholds are given together, the legal estate in the freeholds attracts the legal estate in the copyholds, or *vice versa*.

Chap. XXX. *Baker v. White*, 20 Eq. 166; overruling *Baker v. Parson*, 42 L. J. Ch. 228.

An appointment, under a power to appoint the use, vests the legal estate in the appointee. 2 Jarman, 1157.

A trustee who disclaims the office of trustee disclaims also the legal estate. *In re Birchall*; *Birchall v. Ashton*, 40 Ch. D. 436.

II. THE QUANTITY OF THE ESTATE OF TRUSTEES.

As regards the quantity of the estate taken by the trustee, the same rules apply to copyholds, leaseholds, and freeholds. *Doe v. Barthrop*, 5 Taunt. 382; *Baker v. White*, 20 Eq. 166; *Stevenson v. Mayor of Liverpool*, L. R. 10 Q. B. 81; see *Wyman v. Carter*, 12 Eq. 309.

Devise in fee with power to sell or convey.

1. A devise to trustees and their heirs, with a general power to sell or convey, will give them the fee though some of the limitations might, in the absence of such a power, be legal. *Rackham v. Siddall*, 1 Mac. & G. 607; *Doe d. Shelley v. Edlin*, 4 A. & E. 582; *Bagshaw v. Spencer*, 1 Ves. Sen. 142; 2 Atk. 570; *Watson v. Pearson*, 2 Ex. 581; *Blagrove v. Blagrove*, 4 Ex. 550; *Cropton v. Davies*, L. R. 4 C. P. 159; see *Richardson v. Harrison*, 16 Q. B. D. 85.

Direction to transfer copyholds.

But in the case of copyholds, a direction that they are to be transferred does not require the legal estate. *Doe d. Player v. Nicholls*, 1 B. & C. 336.

And if the power of sale does not arise till after a life estate, the ordinary rule applies to ascertain whether the life estate is equitable or legal. *Doe d. Noble v. Bolton*, 11 A. & E. 188.

Devise enlarged to a fee by trust for sale.

And even, where the devise before the Wills Act would not have carried the fee, a trust to sell will give trustees the fee. *Doe d. Cadogan v. Ewart*, 7 Ad. & E. 636.

2. But though there may be words which will give the trustees a fee, their estate may be controlled if it can be shown what less estate will satisfy the trust.

Devise in fee till an infant attains twenty-one.

Thus, a devise to trustees and their heirs till an infant attains twenty-one, and then to the infant in fee, gives the trustees only a chattel interest. *Goodtitle d. Hayward v. Whitby*, 1 Burr. 228.

So, a devise in fee to trustees to preserve contingent remainders will be cut down to an estate for the life of the tenant for life, if there are no subsequent remainders to preserve. *Doe d. Compere v. Hicks*, 7 T. R. 433; *Haddelsey v. Adams*, 22 B. 266; *Saunders v. Eppe*, 9 W. R. 69.

Chap. XXX.

Devise in fee to preserve contingent remainders.

If, however, there is a power of appointment under which contingent remainders may be created, the estate of the trustees will not be cut down. *Venables v. Morris*, 7 T. R. 342, 437.

This, however, only applies to trustees, especially inserted to preserve contingent remainders. *Doe v. Barthrop*, 5 Taunt. 382.

So a devise to trustees in fee, on trust to pay rents to A. for life, with remainder to B., gives them an estate for A.'s life only. *Playford v. Hoare*, 3 Y. & J. 175.

Devise in fee to pay rents to A. for life with legal remainder over.

A fortiori, if the devise in remainder is an independent devise. *Adams v. Adams*, 6 Q. B. 860; *Cooke v. Blake*, 1 Ex. 220.

In a deed as a general rule a limitation to the use of trustees in fee, will not be cut down to a smaller estate. *Cooper v. Kynock*, 7 Ch. 398.

However, it has been held that a limitation in fee to trustees to preserve contingent remainders will, even in a deed, be cut down to an estate *pur autre vie*, if there is a subsequent limitation of a term to the same trustees. *Curtis v. Price*, 12 Ves. 89; *Beaumont v. Marquis of Salisbury*, 19 B. 198.

But a subsequent limitation in fee to the same trustees, and a grant of a term to other persons, will not cut down the estate of the trustees. *Colman v. Tyndall*, 2 Y. & J. 605; *Lewis v. Rees*, 3 K. & J. 132; see *Fowler v. Lightburne*, 11 Ir. Ch. 495.

Where the devise is to trustees in fee, and they must at least take an estate for life, an indefinite power of leasing will show that they were to have the fee. *Doe d. Tomkyns v. Willan*, 2 B. & Ald. 84; *Doe d. Keen v. Walbank*, 2 B. & Ad. 554; *Riley v. Garnett*, 3 De G. & S. 629; *Collier v. Walters*, 17 Eq. 252; see 1 Ch. 81.

Effect of leasing powers where the devise is in fee.

This does not apply where the power to lease is limited to the continuance of the trust. *Doe d. Kimber v. Cafe*, 7 Ex. 675.

Chap. XXX.

As to what is a general power of leasing, see *Vivian v. Jegon*, L. R. 3 H. L. 285.

Effect where there are remainders to the separate use of a married woman.

And if the first life estate is in trust for a married woman for her separate use, as well as some of the remainders, the intermediate estates will not be legal estates; but the legal estate will be in the trustees, at any rate as long as there are any remainders to the separate use of married women left. *Harton v. Harton*, 7 T. R. 652; *Brown v. Whiteway*, 8 Ha. 145; *Toller v. Attwood*, 15 Q. B. 929.

Devise in fee with a direction to pay debts.

When there is a devise to trustees in fee, followed by a direction to pay debts, or even, when the trustees are also executors, by a mere general direction to pay debts, the fee will not be cut down to a smaller interest, such as an interest *pur autre vie*. *Spence v. Spence*, 10 W. R. 605; 12 C. B. N. S. 199; *Creaton v. Creaton*, 3 Sm. & G. 386; *Smith v. Smith*, 11 C. B. N. S. 121; *Marshall v. Gingell*, 21 Ch. D. 790; see *In re Brooke*; *Brooke v. Brooke*, (1894) 1 Ch. 43.

But this is not the case with a mere charge of debts. *Kenrick v. Lord Beauclerk*, 3 B. & P. 178.

Mere general direction to pay debts.

And a general direction to pay debts will not enlarge a devise to trustees without words of limitation to a fee. *Doe v. Claridge*, 6 C. B. 641.

A devise in fee upon trust to pay an annuity for life, and after the death of the annuitant upon trust for A. in fee, gives the legal estate in fee to the trustees, if the trustees would be bound to raise arrears of the annuity by sale or mortgage. *Fenwick v. Potts*, 8 D. M. & G. 506; *Whittemore v. Whittemore*, 38 L. J. Ch. 17.

Devise to trustees without words of limitation upon trust to pay debts before the Wills Act.

4. In cases before the Wills Act a devise to trustees in words, that did not carry the fee, upon trust to pay debts, or make certain specified payments out of the rents, only gave them a chattel interest till the payments were made. *Cordall's Case*, Cro. El. 316; *Doe v. Simpson*, 5 East, 162; *Ackland v. Lutley*, 9 A. & E. 879; *Hardson v. Williamson*, 1 Kee. 33.

So where the trustees were to pay annuities, and then a specified sum out of the rents and profits, they took an estate for the lives of the annuitants with a chattel interest superadded. *Doe d. White v. Simpson*, 5 East, 162.

The law, however, on this point has been altered by sects. 30 and 31 of the Wills Act, which provide :—

Chap. XXX.

Sects. 30
and 31 of
the Wills
Act.

30. "When any real estate (other than or not being a presentation to a church) shall be devised to any trustee or executor, such devise shall be construed to pass the fee simple, or other the whole estate or interest, which the testator had power to dispose of by will, in such real estate, unless a definite term of years, absolute or determinable, or an estate of freehold, shall thereby be given to him expressly or by implication."

31. "Where any real estate shall be devised to a trustee, without any express limitation of the estate to be taken by such trustee, and the beneficial interest in such real estate, or in the surplus rents and profits thereof, shall not be given to any person for life, or such beneficial interest shall be given to any person for life, but the purposes of the trust may continue beyond the life of such person, such devise shall be construed to vest in such trustee the fee simple or other the whole legal estate which the testator had power to dispose of by will in such real estate, and not an estate determinable when the purposes of the trust shall be satisfied."

The short effect of these obscure sections as stated by Jarman, and adopted by most of the writers who have followed him, is, "that trustees whose estate is not expressly defined by the will, must in every case, and whatever be the nature of the duty imposed on them, take either an estate for life or an estate in fee." 2 Jarm. 1166; see Shelford, Real Property Stat. 432; Lewin on Trusts, 231.

Effect of
these sections
according to
Mr. Jarman.

CHAPTER XXXI.

ON CERTAIN POWERS COMMONLY INSERTED IN WILLS.

Chap. XXXI.**I. Powers of sale.****Mortgage.**

A POWER of sale and exchange authorises a partition. *In re Frith & Osborne*, 3 Ch. D. 618.

A power of sale will not as a general rule authorise a mortgage, though it may, if the object of the sale is to raise a particular charge, subject to which the estate is devised. *Stroughill v. Anstey*, 1 D. M. & G. 635; *Walker v. Southall*, 56 L. T. 882.

Trust to invest.

A devise of real and personal estate upon trust to invest the same in certain securities has been held to give an implied power of sale over the real estate. *Affleck v. James*, 17 Sim. 121; *Mower v. Orr*, 7 Ha. 473; *Cornick v. Pearce*, 7 Ha. 477.

But a power to invest will not have this effect. *Re Holloway; Holloway v. Holloway*, 60 L. T. 46.

Direction to divide.

A direction to divide real and personal estate into moieties does not alone give an implied power of sale. *Cornick v. Pearce*, 7 Ha. 477.

Severance of minerals.

An ordinary power of sale does not authorise the severance of the timber or minerals from the land. *Cholmeley v. Paxton*, 3 Bing. 207; S. C. nom. *Cockerell v. Cholmeley*, 10 B. & C. 564; 3 Russ. 565; 1 R. & M. 418; 6 Bl. N. S. 120; 1 Cl. & F. 60; *Buckley v. Howell*, 29 B. 546.

The Trustee Act, 1893, (56 & 57 Vict. c. 53) sect. 44, gives the Court jurisdiction in the case of trustees authorised to dispose of land by way of sale, exchange, or partition, to sanction sales with an exception or reservation of any minerals.

Whether power of sale extends to purchased lands.

Where there was a power to sell trust funds and invest them in the purchase of land, to be held on such trusts as would best correspond with those then subsisting, with a direction that land

purchased should be considered personalty, it was held that the power of sale extended to purchased lands. *Tait v. Lathbury*, 1 Eq. 174; 35 B. 112. Chap. XXXI.

A power of sale to be exercised after the death of a tenant for life cannot be exercised during his life, though he may consent to the sale. *Blacklow v. Laws*, 2 Ha. 40; *Johnstone v. Baber*, 8 B. 233; *Mosley v. Hide*, 17 Q. B. 91; *Want v. Stallibrass*, L. R. 8 Ex. 175. Power of sale at death of tenant for life.

A direction to sell within five years has been held to be directory merely where the purchase money was to be applied in payment of debts. *Pearce v. Gardner*, 10 Ha. 287; see *Cuff v. Hall*, 1 Jur. N. S. 972. Sale within given period.

Where land is devised to several trustees in fee upon trust to sell, the survivors can sell; and it is not necessary to fill up the number of trustees in order to make a good title. *Lane v. Debenham*, 11 Ha. 192. Surviving trustee can sell.

Similarly if one trustee disclaims the others can sell. *Nicholson v. Wordsworth*, 2 Sw. 365; *Adams v. Taunton*, 5 Mad. 435; see *Crewe v. Dicken*, 4 Ves. 97.

There is an important distinction between a power coupled with an interest and a bare power. Trust and power.

Thus a devise to executors to sell passes the interest, but a devise that executors shall sell the land, or that land shall be sold by them, gives them but a power. *Howell v. Barnes*, Cro. Car. 382; *Yates v. Compton*, 2 P. W. 308; *Lancaster v. Thornton*, 2 Burr. 1027; *Doe v. Shotton*, 8 A. & E. 905; see *Knocker v. Bunbury*, 6 Bing. N. C. 306; *Lambert v. Browne*, 1 R. 5 C. L. 218.

A direction to the testator's executors to sell his lands gives the executors a common law authority under which they can vest the legal estate in a purchaser without the concurrence of the heir. Co. Lit. 112 b. Direction to executors to sell.

If the lands are devised by the will subject to the direction, it would seem the concurrence of the beneficiaries in the sale would be no more necessary than the concurrence of the heir, if the land is not devised.

The proper form of conveyance in such a case appears to be a bargain and sale which will not require to be enrolled under

Chap. XXXI. 27 Hen. VIII. c. 16, as it takes effect at common law and not under the Statute of Uses.

Direction to
sell copyholds.

If the testator directs copyholds to be sold, or to be sold and conveyed, the purchaser is entitled to be admitted without the previous admittance either of the trustees or the heir. *Holder v. Preston*, 2 Wills. 400; *R. v. Wilson*, 11 W. R. 70; 3 B. & S. 201.

The same principle applies if the copyholds are devised to the trustees subject to the power. *Glass v. Richardson*, 9 Ha. 698; 2 D. M. & G. 658.

Acting
executors
may sell.

The statute 21 Hen. VIII. c. 4, enacts in effect, that if any of the executors refuse to undertake the administration and charge of the will, the executors or executor accepting the charge may sell under a direction to the executors to sell the land.

Copyholds are within the statute. *Peppercorn v. Wayman*, 5 De G. & S. 230.

Survival of
powers and
trusts.

The Trustee Act, 1893 (56 & 57 Vict. c. 53), sect. 22, provides that where a power or trust is given to or vested in two or more trustees, the same may be exercised or performed by the survivors or survivor.

The section applies only to trusts constituted after or created by instruments coming into operation after the 31st December, 1881.

Sect. 50 provides that the expressions trust and trustee shall include the duties incident to the office of personal representative of a deceased person. Sect. 22 therefore extends to executors.

Conveyancing
Act, 1882,
s. 6.

Sect. 6 of the Conveyancing Act, 1882 (45 & 46 Vict. c. 39), enables a person, to whom any power, whether coupled with an interest or not, is given, by deed to disclaim the power, and on such disclaimer the power may be exercised by the other or others or the survivors or survivor of the others of the persons to whom the power is given, unless a contrary intention is expressed in the instrument creating the power. See *In re Fisher*, 13 L. R. Ir. 546.

The section applies to powers created by instruments coming into operation before or after the commencement of the Act.

A power coupled with a duty cannot be released or disclaimed

either under this Act or otherwise. *Re Eyre; Eyre v. Eyre*, Chap. XXXI. 49 L. T. 259; *Weller v. Ker*, L. R. 1 H. L. Sc. 11.

A power of sale given to the testator's executors or administrators may be exercised by his administrator *durante minore ætate*. *Monseil v. Armstrong*, 14 Eq. 423. Sale by administrator.

It appears to be settled that a bare power of sale given to several persons *nominatim* cannot be exercised by the survivors. Co. Lit. 113 a, note by Hargrave. Bare power does not survive.

Sect. 22 of the Trustee Act, 1893, applies only to powers and trusts vested in trustees and executors. It is a question of construction upon the will whether a power or trust is vested in a person who is appointed trustee or executor in that capacity, or whether it is given to him on personal grounds independently of his office. Whether power is given to executor as such or not.

It is settled that a power of sale given to "my executors hereinafter named" is given to them as executors. It can therefore be exercised by those for the time being holding the office, but not by a disclaiming executor. *Houell v. Barnes*, Cro. Car. 382; W. Jo. 352; *Yates v. Compton*, 2 P. W. 308; *Byam v. Byam*, 19 B. 58; *Brassey v. Chalmers*, 4 D. M. & G. 528; *Crawford v. Forshaw*, (1891) 2 Ch. 261. See *Keates v. Burton*, 14 Ves. 434; *In re Cooke's Contract*, 4 Ch. D. 454.

Whether a power given to "my executor A." is given to him as executor or not, must depend on the nature of the power and on the general language of the will. A power of sale so given has been held to be exerciseable by the person irrespective of the office, while a power to distribute a fund for charitable purposes was held given in respect of the office. *Madden v. Madden*, 23 L. R. Ir. 167; *A.-G. v. Fletcher*, 5 L. J. Ch. 75.

It would seem, that where there is a direction that the lands shall in certain events be sold by a class of persons such as the testator's sons, the power can be exercised by the surviving sons, though some have died after the testator's death. *Vincent v. Lee*, Cro. Eliz. 26. Survivors of a class may sell.

A power of sale given to executors, the object of the sale not being payment of debts, cannot be exercised by an executor of an executor. Yearbooks, 19 Hen. VIII. fo. 9 a, pl. 4; Chance on Powers, 250. Executor of executor cannot sell.

Chap. XXXI.

Bare power
to trustees
and their
heirs.

It has been held that a bare power to sell given to trustees and their heirs can be exercised by the surviving trustees and the heir of a deceased trustee jointly, but not by survivors of the trustees only. *Mansell v. Vaughan*, Wilm. 51; *Townsend v. Wilson*, 1 B. & Ald. 608; 3 Mad. 261. See *Hall v. Dewes*, Jac. 189.

Devolution of
trust for sale.

Where property was devised to trustees and their heirs on trust to sell, and the last surviving trustee died intestate, his heir could sell. *In re Morton & Hallett*, 15 Ch. D. 143.

And it has been held that the devisee of trust estates of the last surviving trustee can also sell in such a case. *Osborne to Rowlett*, 13 Ch. D. 774.

Since the Conveyancing Act the personal representatives of the last surviving trustee are the persons to exercise the trust for sale, except in the case of copyholds. See p. 184.

But where the devise is to trustees without words of limitation upon trust that they or the survivor shall sell, the representatives of the survivor cannot exercise the trust for sale. *In re Ingleby Boak*, 13 L. R. Ir. 326.

Whether
infant can
consent.

Where the consent of a tenant for life is required, an infant tenant for life may consent if there is an intention shown that the power should be exerciseable during minority; for instance, if the power is to be exercised with the consent of a named person who is an infant at the time. *In re Cardross' Settlement*, 7 Ch. D. 728.

Tenant for
life may
consent after
alienation.

If the consent of the tenant for life is required, he may give his consent, though he has aliened his life estate, if his alienee concurs. *Alexander v. Mills*, 6 Ch. 124.

Bankruptcy
of tenant for
life.

In the event of the bankruptcy of the tenant for life, the power of sale may be exercised with the consent of the tenant for life and his trustee in bankruptcy. *Holdsworth v. Goose*, 29 B. 111; *Eisdale v. Hammersly*, 31 B. 255; *In re Cooper*; *Cooper v. Slight*, 27 Ch. D. 565; *In re Beddingfield and Herring's Contract*, (1893) 2 Ch. 332; see, too, *Hardaker v. Moorhouse*, 26 Ch. D. 417.

Reservation
of power of
consent.

If the tenant for life upon the alienation of his life estate has expressly reserved his right to consent to the sale, the con-

currence of the alienee of the life estate is not necessary. Chap. XXXI.
Warburton v. Farn, 16 Sim. 625.

Where trustees were authorised to sell with the consent of the tenant for life for the time being and to invest the proceeds, and there was a direction that no investment should be made while there should be a tenant for life or tenant in tail of full age without his consent, it was held that the trustees might sell during the minority of a tenant in tail without his consent. *In re Neave's Estates*, 28 W. R. 976; 49 L. J. Ch. 642.

Power of sale
with consent.

Where the power of sale was exercisable with the consent of any tenant for life entitled to the possession of the estates, and the testator created a term upon trust to pay the rents of all his estates to his wife during her widowhood and in the event of her marriage upon trust to pay her an annuity, it was held that the trustees might sell with the consent of the tenant for life and widow. *Robertson v. Walker*, 44 L. J. Ch. 220.

Where the power was not to be exercised over any part of the property without the consent of the testator's "sons and daughters also," who were tenants for life, it was considered doubtful whether the power could be exercised after the death of a daughter. *Sykes v. Sheard*, 33 B. 114; 2 D. J. & S. 6; see *Jefferys v. Marshall*, 19 W. R. 94.

Whether
survivors of a
class can
consent.

It appears to be clear, that where a reversion is settled for life with remainders, and a power of sale is given to trustees, the power of sale may be exercised before the property falls into possession. *Clark v. Seymour*, 7 Sim. 67; *Blackwood v. Borrowes*, 4 Dru. & War. 441, 468.

Power of sale
over reversion.

If the reversion subject to the life interest of A. is only to be sold with the consent of the person in possession under the will, the property may be sold if A. surrenders his life interest to the person entitled under the will. *Truell v. Tysson*, 21 B. 437; see *Giles v. Horner*, 15 Sim. 359.

A trustee for sale cannot contract to sell at a future time at a price now fixed. *Clay v. Rufford*, 5 De G. & S. 768.

Sale at a
future date.

Trustees with a power of sale may join with the owner of another property in selling both properties, if such a mode of sale is beneficial; but the purchase-money must be apportioned

Sale of several
properties
together.

Chap. XXXI. before the completion of the purchase. *Cavendish v. Cavendish*, 10 Ch. 319; *Morris v. Debenham*, 2 Ch. D. 540; *In re Cooper & Allen*, 4 Ch. D. 802, where *Rede v. Oakes*, 4 D. J. & S. 505, is explained.

How long a power of sale is exercisable.

Where the instrument expressly fixes a period within the bounds of perpetuity during which a power of sale may be exercised, the power is exercisable during the period though the property has vested in persons absolutely entitled so long as they have taken no steps to put an end to the power. *In re Cotton's Trustees*, 19 Ch. D. 624.

In the same way where property is given to absolute owners free from disability, whether immediately or on the death of a tenant for life, and a power of sale for the purpose of division is given to trustees, this power is valid and exercisable within a reasonable time after it arises. *Peters v. Lewes & East Grinstead Ry. Co.*, 18 Ch. D. 429; *In re Cooke's Contract*, 4 Ch. D. 454.

When power of sale at an end.

But in the ordinary case of a power of sale given to trustees without any express limit of time, so that it is necessary to find some limit to save the power from invalidity on the ground of perpetuity, the power is spent when the settlement is at an end, that is to say, when all the interests have vested absolutely in possession. *Lantsbery v. Collier*, 2 K. & J. 718; *Woolley v. Jenkins*, 23 B. 53, affirmed 3 Jur. N. S. 321; *Peters v. Lewes & East Grinstead Ry. Co.*, 18 Ch. D. 429.

Limitations created under special power.

For the purpose of determining, whether the interests have become absolutely vested, limitations created under a special power of appointment are to be considered as if they had been inserted in the original instrument. *In re Brown's Settlement*, 10 Eq. 349.

Existence of jointure.

The fact that a jointure secured by a term remains charged, and that the widow has power to charge a sum of money on the estate, will not keep the power of sale alive. *Woolley v. Jenkins*, 23 B. 53; *Wheate v. Hall*, 17 Ves. 86.

Vesting of one moiety.

If the property is devised in moieties, the fact that the trusts of one moiety have come to an end will not put an end to the power of sale, if the trusts of the other moiety are subsisting, unless the power is limited to property subject to continuing

trusts. *Trower v. Knightley*, 6 Mad. 134; *Wood v. White*, 4 Chap. XXXI. M. & Cr. 460.

In the case of a trust for sale, it has been held that the trust may be exercised without the concurrence of the beneficiaries, though the last tenant for life has been dead six years and all the beneficiaries are *sui juris*. *In re Tweedie and Miles' Contract*, 27 Ch. D. 315.

Trust for sale not spent by vesting in possession.

In this case the trust was exercised within twenty-one years after the death of the last tenant for life. But if the trust does not come to an end when the interests are vested in possession, it would seem that it may be exercised at any time unless the delay in exercising the trust has been "unreasonable"—a matter not easy to determine. In *Tweedie and Miles* six years was held not an unreasonable delay.

As to a settlement keeping alive the powers of an earlier settlement, see *In re Wright's Trustees and Marshall*, 28 Ch. D. 93.

If trustees have invested trust funds in land without any authority, they can make a good title to a purchaser if one of the beneficiaries concurs, inasmuch as one beneficiary is entitled to have the estate sold. *In re Patten*, 52 L. J. Ch. 787.

Power to sell land bought without authority.

A power of selling for a particular purpose only, such as payment of debts, is, of course, at an end if the purpose is satisfied. *Carlyon v. Truscott*, 20 Eq. 348.

Power to sell for satisfied purpose.

Where trustees have an absolute discretion as to the exercise of a power the Court will not compel them to exercise the power, though it will control an improper exercise of the power. *Marquis Camden v. Murray*, 16 Ch. D. 161; *Tempest v. Lord Camoys*, 21 Ch. D. 571; *In re Blake*; *Jones v. Blake*, 29 Ch. D. 913; see *Thomas v. Williams*, 24 Ch. D. 558.

Discretionary trust for sale.

It has been held that where there is a discretionary trust for sale subsisting the Court will not make a decree for partition or sale. *Biggs v. Peacock*, 22 Ch. D. 284.

Whether trust for sale prevents sale in partition action.

But this principle does not apply to the case of a simple power of sale. *Re Norris*, W. N. 1883, pp. 35, 65; *Boyd v. Allen*, 24 Ch. D. 622.

The fact that an action has been commenced to execute the trusts of the will would not prevent the trustees from exercising

Suspension of power of sale.

Chap. XXXI.

a power of sale if they are willing to do so, though a prudent trustee would not sell without the sanction of the court. It may be advisable for the purchaser not to complete without notice to the plaintiffs in the action. *Cafe v. Bent*, 3 Ha. 245, 249; *Turner v. Turner*, 30 B. 414. The case of *Walker v. Smallwood*, Amb. 676, is no authority to the contrary. See, however, *Lewin on Trusts*, 467.

After judgment the powers of the trustees can only be exercised under the sanction of the Court. *Bethell v. Abraham*, 17 Eq. 24; see *In re Gadd*; *Eastwood v. Clarke*, 23 Ch. D. 134; *In re Norris*; *Allen v. Norris*, 27 Ch. D. 333.

But this rule does not apply to a sale by a tenant for life under the Settled Land Act, and probably not to a case where the action is practically at an end. *Cardigan v. Curzon Howe*, 30 Ch. D. 530; *In re Mansel*; *Rhodes v. Jenkin*, 54 L. J. Ch. 883.

Persons to
exercise power
not named.

A difficulty sometimes arises, where there is a direction to sell the testator's land, but the persons to carry out the sale are not mentioned.

Executors
may sell if
object of sale
is to pay
debts.

In such cases, if the purpose of the sale is to pay debts, the executor is the person to sell. *Anon.*, 3 Dyer, 371 b; *Blatch v. Wilder*, 1 Atk. 420; *Forbes v. Peacock*, 11 M. & W. 630; see *Hooper v. Strutton*, 12 W. R. 367.

Proceeds of
sale mixed
with per-
sonalty.

The same is the case, if the proceeds of sale are to be divided with the personalty in certain shares, though there may be no charge of debts. *Tylden v. Hyde*, 2 S. & St. 238; *Ward v. Devon*, cit. 11 Sim. 160; *Forbes v. Peacock*, 11 M. & W. 630; 1 Ph. 717.

Direction to
sell and
divide.

But a mere direction to sell lands and divide the proceeds, where they are not mixed with the personalty, or a direction in certain events to sell lands which are directly devised, gives the executors no power of sale. *Bentham v. Wiltshire*, 4 Mad. 44; *Patton v. Randall*, 1 J. & W. 189; *Allum v. Fryer*, 3 Q. B. 442; *Curtis v. Fulbrook*, 8 Ha. 25, 278; *Haydon v. Wood*, ib. 279. See, however, *Lockton v. Lockton*, 1 Ch. C. 179.

Power of sale
implied from
charge of
debts.

The question, whether a charge of debts on land gives the executors a power of sale has become of small importance since Lord St. Leonards' Act, 22 & 23 Vict. c. 35, sects. 14—18,

which applies to wills coming into operation after the 13th August, 1859. Chap. XXXI.

Sects. 14—16 in effect enact, that devisees in trust of the testator's whole interest in real estate charged with debts or legacies, no provision being made for the raising such debts or legacies, may raise the same by sale or mortgage, and where the estate subject to the charge is not devised to trustees for the testator's whole interest, the executors have a similar power of raising the amount. Lord St. Leonards' Act, sects 14 16, and 18.

Sect. 16 does not enable an administrator to sell. *In re Clay & Tetley*, 16 Ch. D. 3.

Sect. 18 declares that the said sections of the Act shall not extend to a (beneficial) devise to any person or persons in fee or in tail, or for the testator's whole estate and interest charged with debts or legacies, nor shall they affect the power of any such devisee or devisees to sell or mortgage, as he or they may by law now do.

Sect. 18 does not apply where an estate is devised by way of settlement. *Re Wilson*; *Pennington v. Payne*, 54 L. T. 600; 34 W. R. 512.

In cases where this Act does not apply the law is not in a very satisfactory state. Wills not within the Act.

1. Where debts and legacies are charged on land, and the land is devised to trustees upon trusts not including the payment of debts, the trustees and not the executors are apparently the persons to sell and receive the purchase money. *Shaw v. Borrer*, 1 Kee. 559; *Ball v. Harris*, 4 M. & Cr. 264; *Stroughill v. Anstey*, 1 D. M. & G. 647; *Sabin v. Heape*, 27 B. 553; *Hodkinson v. Quinn*, 1 J. & H. 303. Devise to trustees of land subject to a general charge of debts.

In such a case the fact that the trustees take only an estate *pur autre vie*, the use in remainder being executed by the effect of the Statute of Uses, will not affect their power to sell in order to raise the charge. *Eidsforth v. Armstead*, 2 K. & J. 333.

2. When there is a charge of debts and legacies on land, and the land is devised beneficially, expressly subject to the charge, to a person, who is one of several executors, he can sell and pass the legal estate. *Colyer v. Finch*, 5 H. L. 905; *Johnson v.* Beneficial devise subject to debts to a person who is also executor.

Chap. XXXI. *Kennett*, 3 M. & K. 624; *Corser v. Cartwright*, 8 Ch. 971; L. R. 7 H. L. 731.

Devise to
person not
executor.

3. Where there is a charge of debts and legacies on land which is given to a devisee for his own use or as to which the testator dies intestate, the better opinion appears to be that the executor cannot, but the devisee or heir can alone give a good title. *Doe v. Hughes*, 6 Ex. 223; *Johnson v. Kennett*, 3 M. & K. 624; *Corser v. Cartwright*, 8 Ch. 971, 975. See *Gosling v. Carter*, 1 Coll. 644.

On the other hand an intention may be collected from the will, that the executor, and not the devisee, was intended to enforce the charge, in which case the power of sale would include the power of passing the legal estate as well.

Thus, if the land is devised for life with contingent remainders over, it is clear that the devisees cannot make a good title; yet, on the other hand, the charge must be raised at once, and therefore a power of sale is implied in the executor. *Robinson v. Lowater*, 5 D. M. & G. 275.

Where a testator directs his debts to be paid by his executors, and charges them on his real estate, a power of sale by implication will not be given to an administrator. *In re Clay & Tetley*, 16 Ch. D. 3.

Lord Romilly appears to have been of opinion that a charge of debts on land, where the land is beneficially devised, gives the executors an implied power of sale. See *Wrigley v. Sykes*, 21 B. 337; *Bolton v. Stannard*, 4 Jur. N. S. 576; but these cases may be supported on other grounds.

For the opinions of the text-writers on this subject, see Sugd. V. & P. 13th ed. 545; Pow. 121—2; Williams on Real Assets, ch. vi. p. 77; Davidson's Conv. vol. ii., part ii., 468 n.; Dart V. & P. 697, seq.; Lewin on Trusts, 515, seq.; Hayes & Jarman's Conc. Prec. 491; Farwell on Powers, 79; Shelford's Real Property Statutes, 388; Godefroi on Trustees, 387.

Charge of
specific debts
or single
legacy.

4. A charge upon land of specific debts or of a single legacy does not enable the devisee, though he may also be executor, to make a title. *Doran v. Wiltshire*, 3 Sw. 699; *In re Rebbeck*; *Bennett v. Rebbeck*, 42 W. R. 473; 71 L. T. 74.

Charge of

5. Whether under a charge of legacies only, the devisee can

sell or mortgage without the concurrence of the legatees, is a question of some difficulty. In *Horn v. Horn*, 2 S. & St. 448, it was held he could not, and in *Johnson v. Kennett*, 3 M. & K. 624, Lord Lyndhurst lays down, that where legacies alone are charged, the purchasers of the real estate are bound to see to the application of the purchase money (p. 630). But the point did not arise in that case, and Lord Lyndhurst's reasoning was not approved by Lord St. Leonards in *Stroughill v. Anstey*, 1 D. M. & G. 635, who puts it upon intention only; and Lord Cranworth, in *Colyer v. Finch*, 5 H. L. 905, 922, places a charge of legacies upon the same footing as a charge of debts.

Chap. XXXI.

legacies only.

The views expressed in *Stroughill v. Anstey* and *Colyer v. Finch*, seem to have received statutory approval by sect. 18 of Lord St. Leonards' Act, which declares that the Act is not to affect the power of a devisee subject to debts or legacies to sell "as he may by law now do" (see also Mr. Waley's note to Davidson, vol. ii., part ii., Mortgages, p. 474; *Re Wilson*; *Pennington v. Payne*, 34 W. R. 512).

A purchaser of freeholds is not entitled to enquire whether any debts are subsisting unless twenty years have elapsed since the testator's death. In *re Tanqueray-Willawme & Landau*, 20 Ch. D. 465; In *re Molyneux & White*, 13 L. R. Ir. 382; 15 L. R. Ir. 383.

Inquiries as to debts.

A purchaser from the executor of leaseholds is not entitled to enquire, although more than twenty years have elapsed since the testator's death. In *re Whistler*, 35 Ch. D. 561; In *re Venn & Furze's Contract*, (1894) 2 Ch. 101, explaining *In re Molyneux & White*, 13 L. R. Ir. 382; 15 L. R. Ir. 383.

There can be no reasonable doubt, that a power to mortgage authorises a mortgage with power of sale. By sect. 19 of the Conveyancing Act, 1881, a power of sale is expressly given to mortgagees. In *re Chaumer's Will*, 8 Eq. 569, overruling *Clark v. Royal Panopticon*, 4 Dr. 26.

II. Power to mortgage.

Under a power to raise a sum by way of mortgage, the costs of effecting the security may be raised. *Armstrong v. Armstrong*, 18 Eq. 541.

And a trustee may raise the costs of transferring a mort-

Costs of transfer.

Chap. XXXI. gage if he has any duty to protect the estate from foreclosure or sale. *Sewell v. Bishopp*, 68 L. T. 323 ; 69 L. T. 68.

As to the validity of a mortgage by demise under a power of leasing, see *Mostyn v. Lancaster*, 23 Ch. D. 583.

As to what words give a power to mortgage, see *In re Jones ; Dutton v. Brookfield*, 59 L. J. Ch. 31 ; 61 L. T. 661 ; 38 W. R. 90 ; *Re Webb ; Leedham v. Patchett*, 63 L. T. 545 ; *Redman v. Rymer*, 65 L. T. 270.

III. Power
of giving
receipts.

By sect. 20 of the Trustee Act, 1893 (56 & 57 Vict. c. 53), the receipt of any trustee for any money securities or other personal property or effects payable, transferable, or deliverable to him under any trust or power is made a sufficient discharge.

The section applies to trusts created before or after the commencement of the Act.

Receipt by
agent.

Sect. 17 of the Trustee Act, 1893 (56 & 57 Vict. c. 53), enables a trustee to appoint a solicitor to be his agent to receive and give a discharge for any money or valuable consideration, or property recoverable by the trustee by permitting the solicitor to have the custody, and to produce a deed containing any such receipt as is referred to in sect. 56 of the Conveyancing Act, 1881.

The section applies only where the money or valuable consideration or property is received after the 24th December, 1888.

In cases to which the section does not apply, trustees, unless empowered to do so by the instrument under which they act, ought not to authorise a solicitor or other agent, or even one of themselves, to receive purchase-money, and the purchaser may insist upon payment either to the trustees personally or to their account at a bank. *In re Bellamy*, 24 Ch. D. 387 ; *In re Flower*, 27 Ch. D. 592.

IV. Execu-
tor's powers.

An executor may sell or mortgage any part of the testator's personal assets. *Earl Vane v. Rigden*, 5 Ch. 663 ; *Cruikshank v. Duffin*, 13 Eq. 555 ; *Berry v. Gibbons*, 8 Ch. 747 ; *In re Ryan & Kavanagh*, 17 L. R. Ir. 42 ; *In re Whistler*, 35 Ch. D. 561.

The executor's power extends to real estate used for partnership purposes. *West of England and South Wales District*

Bank v. Murch, 23 Ch. D. 138; see *Boylan v. Fay*, 8 L. R. Ir. Chap. XXXI. 374; *Devitt v. Kearney*, 13 L. R. Ir. 45.

And by way of compromise, a sale partly for shares in a company may be upheld. *West of England Bank v. Murch*, 23 Ch. D. 138.

An administrator *durante minore ætate* has the same power of selling personal property as an executor. *In re Cope*, 16 Ch. D. 49; not following *In re Robinson*, 3 L. R. Ir. 429.

Debts contracted by an executor, though for the purposes of the estate, are the executor's debts, and cannot be proved against the estate, though if the executor is entitled to be indemnified by the estate against the debts he has incurred, the executor's creditors may, to the extent of the indemnity, prove against the estate. *Farhall v. Farhall*, 7 Ch. 123; *Douse v. Gorton*, 40 Ch. D. 536; (1891) A. C. 190.

An administrator cannot by mortgage raise money for the repair of leaseholds, which he is not under liability to repair. *Ricketts v. Lewis*, 20 Ch. D. 745.

Where there is a trust for conversion, unauthorised securities should, as a general rule, be sold within a year from the death. *Bate v. Hooper*, 5 D. M. & G. 338; *Hughes v. Empson*, 22 B. 181.

V. Conversion of personality within a year.

But executors, who *bond fide* postpone the sale of securities of fluctuating value, upon which there is no liability, will not be liable for a loss. *Burton v. Burton*, 1 M. & Cr. 80; *Marsden v. Kent*, 5 Ch. D. 598.

Where postponement of conversion justified.

Shares, upon which there is an unlimited liability, ought to be sold within the year under a direction to convert. *Grayburn v. Clarkson*, 3 Ch. 605; *Sculthorpe v. Tipper*, 13 Eq. 232; *The Heirs Hiddingh v. De Villiers Denysen*, 12 App. C. 624.

If there is a discretionary trust to convert, trustees *bond fide* exercising their discretion will not be liable for not selling shares upon which the liability is unlimited. *In re Norrington*; *Brindley v. Partridge*, 13 Ch. D. 655.

Discretionary trust.

As to wasting securities see *Wilday v. Sandys*, 7 Eq. 455; *Tickner v. Old*, 18 Eq. 422.

Under 23 & 24 Vict. c. 145, sect. 30, executors had power to

VI. Power to compromise.

Chap. XXXI.

compromise debts and also claims by persons claiming as beneficiaries. *West of England and South Wales District Bank v. Murch*, 23 Ch. D. 138; *In re Warren*; *Weadon v. Reading*, 32 W. R. 916; 51 L. T. 561.

That section is superseded by sect. 21 of the Trustee Act, 1893, which applies to executorships and trusts constituted or created before or since the commencement of the Act.

That section provides that an executor or administrator may pay, or allow any debt or claim on any evidence that he thinks sufficient, and gives power to an executor or administrator or to two or more trustees, or to a sole acting trustee, where a sole trustee is authorised to execute the trusts and powers, to compromise claims.

Executors before the Act had a fair discretion as to suing debtors, but the Act has extended their powers and it seems that as long as they act in good faith they will not be liable for not taking proceedings against debtors. *Re Owens*; *Jones v. Owens*, 47 L. T. 61.

VII. Invest-
ment.

The Trustee Act, 1893 (56 & 57 Vict. c. 53), sect. 1, which applies to trusts created before or after the passing of the Act, authorises trustees, unless expressly forbidden by the instrument creating the trust, to invest any trust funds in their hands, whether at the time in a state of investment or not, in the securities there mentioned, and to vary any such investment.

Sect. 3 deals with redeemable stocks, and sect. 5 enlarges existing powers of investment.

The power to vary extends to all funds belonging to the trust, as well securities bought before the Act as those bought since. *Hume v. Lopes*, (1892) A. C. 112.

Duty of
trustee as
regards
investments.

In cases of investment the trustees have to consider two matters: 1. Is the proposed investment within the power of investment conferred upon them? 2. If it is, is it a proper investment of its kind?

Thus a power to invest in such securities as they think fit will not authorise trustees to invest upon a mortgage without proper inquiries as to the sufficiency of the security, nor will it authorise them to invest in a security upon which there is a liability. *Harris v. Harris*, 29 B. 107; *Stretton v. Ashmall*, 3

Dr. 9; *In re Kavanagh*, 27 L. R. Ir. 495; S. C., sub nom. Chap. XXXI.
Murphy v. Doyle, 29 L. R. Ir. 333.

And a power to invest on mortgage does not justify investment on a contributory mortgage. *Webb v. Jonas*, 39 Ch. D. 660.

A power to invest in securities will not authorise the purchase of shares which are not secured upon anything. *Harris v. Harris*, 29 B. 107; *In re Kavanagh*, 27 L. R. Ir. 495; *Murphy v. Doyle*, 29 L. R. Ir. 333. Power to invest in securities.

A power to invest on real securities does not include long leaseholds. *In re Boyd's Settled Estates*, 14 Ch. D. 627. Real securities.

But sect. 5 of the Trustee Act, 1893, extends such a power to the long leaseholds mentioned in that section.

A company incorporated under the Companies Acts has been held to be a Public Company, and a company incorporated by a charter granted under a special Act has been held to be a company incorporated by Act of Parliament. *In re Sharp; Rickett v. Sharp*, 45 Ch. D. 286; *Elve v. Boyton*, (1891) 1 Ch. 501. Public company.

A power to invest by placing on deposit with a firm does not authorise trustees to continue the deposit after a change in the members of the firm. *In re Tucker; Tucker v. Tucker*, (1894) 1 Ch. 724. Power to deposit with a firm.

The cases upon investment will be found collected in Godefroi on Trustees, 419; Lewin, 326; Vaizey, 428.

Under the common power of investing with consent a previous consent is necessary, and it must be given at the time of the investment, and cannot be given by anticipation. *Bateman v. Davis*, 3 Mad. 98; *Child v. Child*, 20 B. 50.

If the consent is to be signified by deed, the deed may be executed after the exercise of the power, if consent has been previously given. *Offen v. Harman*, 1 D. F. & J. 253.

Trustees holding lands on trust to raise money out of the rents or to pay the rents to a tenant for life, can let the lands from year to year or for any reasonable term. *Naylor v. Arnitt*, 1 R. & M. 501; *Fitzpatrick v. Waring*, 11 L. R. Ir. 35; not following *In re Shaw's Trusts*, 12 Eq. 124. VIII. Powers of leasing.

Where a tenant for life with power of leasing enters into an

Chap. XXXI.

agreement for a lease and dies before the lease is executed the trustees may carry the agreement into effect. *Davis v. Harford*, 22 Ch. D. 128. See now the Settled Land Act, 1882, sect. 12.

As to the construction of a power of leasing, see *Hallett to Martin*, 24 Ch. D. 624.

Lease by
executor.

An executor can make a lease, but if impugned by a beneficiary it would lie upon the executor and lessee to show that it was made in a due course of administration. *Keating v. Keating*, Ll. & G. t. Sug. 133.

Lease with
option to
purchase.

If an executor makes a lease giving the lessee an option to purchase at a fixed price, the option to purchase cannot be exercised against the beneficiaries. *Oceanic Steam Navigation Co. v. Sutherland*, 16 Ch. D. 236.

Lease of
several
properties.

In the absence of any special circumstances trustees of contiguous estates held upon different trusts cannot make a lease of both estates under one demise. *Tolson v. Sheard*, 5 Ch. D. 10.

Power to
lease not
accelerated.

A power to lease after the death of a tenant for life cannot be exercised before his death, though the life estate may be surrendered. *Coxe v. Day*, 13 East, 118.

Covenants
for renewal.

As to the effect of covenants for renewal in leases under powers, see *Gas Light and Coke Company v. Towse*, 35 Ch. D. 519.

In certain cases the Court is enabled to remedy defects in leases granted under powers. 12 & 13 Vict. c. 26; 13 & 14 Vict. c. 17; *Gas Light and Coke Company v. Towse*, *supra*.

IX. Manage-
ment, repairs,
and improve-
ments.

Large powers of management, and of laying out money in repairs and improvements, are given by the Conveyancing Act, 1881, sect. 42, and the Settled Land Acts, 1882 to 1890.

Formerly, money to be laid out in land could be laid out in the erection of new buildings, but not in repairs and permanent improvements. *Drake v. Trefusis*, 10 Ch. 364.

But now by virtue of the Settled Land Act, 1882, sect. 21, and the Settled Land Act, 1890, sect. 13, capital money arising under the Act can on the direction of the tenant for life be laid out in any of the modes mentioned in those sections, which include improvements, and inasmuch as land if purchased could

be sold by the tenant for life and applied under the Act, money to be invested in land can be applied as capital money arising under the Act. *In re Mackenzie's Trusts*, 23 Ch. D. 750.

Chap. XXXI.

The Conveyancing Act, sect. 42, confers powers of management upon trustees where infants are beneficially interested in the land and expenses may be paid out of income.

Where leaseholds are held by trustees on trust for a tenant for life with limitations over, it has been held to be the duty of the trustees to see that the covenants in the leases as to repairs are performed. *In re Fowler*; *Fowler v. Odell*, 16 Ch. D. 723.

Duty of trustees as to leaseholds.

And trustees for sale ought, it has been said, to keep the property in a saleable condition. *In re Hotchkys*; *Freke v. Calmady*, 32 Ch. D. 408.

Where there is no power given to the trustees to lay out money in repairs, and the Settled Land Acts do not apply, the Court will in certain cases allow money to be raised out of capital and spent on repairs. For the principles upon which the Court acts in such cases see *In re Jackson*; *Jackson v. Talbot*, 21 Ch. D. 786; *In re Household*; *Household v. Household*, 27 Ch. D. 553; *Conway v. Fenton*, 40 Ch. D. 512; *In re Hurst*, 29 L. R. Ir. 219; *In re De Teissier*; *De Teissier v. De Teissier*, (1893) 1 Ch. 153.

By sect. 18 of the Trustee Act, 1893 (56 & 57 Vict. c. 53), trustees are empowered to insure up to the three-fourths of the value of the building insured, and to pay the premiums out of the income of the property insured and any other property held on the same trusts. The section applies to trusts created before and after the commencement of the Act.

X. Power to insure.

By sect. 19 of the Trustee Act, 1893 (56 & 57 Vict. c. 53), trustees of renewable leaseholds may, if they think fit, and must, if thereto required by any beneficiary, use their best endeavours to obtain renewals. Where by the terms of the settlement or will the tenant for life is entitled to enjoyment without any liability to renew or contribute to the expense of renewal the trustees cannot exercise this power without his consent. The trustees may pay the expenses of renewal out of any money in their hands held upon the same trusts, or if

XI. Power to renew leases.

Chap. XXXI. they have none, may raise the expenses by mortgage. The section applies to trusts created before and after the commencement of the Act.

The section does not alter rights between tenant for life and remainderman. *In re Baring; Jeune v. Baring*, (1893) 1 Ch. 61.

XII. Carrying on business.

Executors or trustees cannot carry on the testator's business without express authority to do so. *Travis v. Milne*, 9 Ha. 142; *Kirkman v. Booth*, 11 B. 273.

Where a will contained the usual trust for sale with power to postpone the sale, the executors were held justified in carrying on the business for two years with a view to a sale. *In re Chancellor; Chancellor v. Brown*, 26 Ch. D. 42.

What capital may be employed.

A direction to carry on the testator's business only authorises the employment in the business of the capital, which the testator himself employed in the business at his decease. *M'Neillie v. Acton*, 4 D. M. & G. 744; see *Re Dimmock; Dimmock v. Dimmock*, 52 L. T. 494.

Power to use business premises.

Under such a direction the executors are entitled to use the freehold or leasehold premises where the business was carried on by the testator, and they may mortgage them for the purposes of the business. *Devitt v. Kearney*, 13 L. R. Ir. 45; *In re Cameron; Nixon v. Cameron*, 26 Ch. D. 19.

An authority to trustees to carry on the business does not authorise two out of three trustees to carry it on. *Ex parte Butcher; In re Mellor*, 13 Ch. D. 465.

Debts incurred by executors.

Debts incurred by the executor in carrying on the business are his debts, and the creditors to whom these debts are owing have no direct remedy against the testator's estate. They cannot prove against the estate or take the testator's assets in execution. *Ex parte Garland*, 10 Ves. 110; *Owen v. Delamere*, 15 Eq. 134; *Abbott v. Parfitt*, L. R. 6 Q. B. 346; *Fairland v. Percy*, 3 P. & D. 217; *Hall v. Fennell*, L. R. 9 Eq. 406, 615; *In re Morgan; Pillgrem v. Pillgrem*, 18 Ch. D. 93; *Lord Talbot de Malahide v. Moran*, 8 L. R. Ir. 307.

Bankruptcy of executor.

If the executor becomes bankrupt the beneficiaries have no claim against his estate for the assets of the testator properly employed in the trade, though they can prove for assets

employed in excess of his authority. *Ex parte Richardson*, Chap. XXXI. Buck, 202; 3 Mad. 138; *Scott v. Izon*, 34 B. 434.

The executor is entitled to be indemnified out of the assets properly employed by him in the business against the debts which he has incurred in carrying it on, and the creditors to whom these debts are owing may stand in the place of the executor to the extent of this indemnity. See cases *supra*; *Cutbush v. Cutbush*, 1 B. 184.

Executor's
right to
indemnity.

The right to indemnity is the executor's right; it is therefore subject to any equities between him and the estate. For instance, if upon taking the accounts he is indebted to the estate, his right, and therefore the right of his creditors to indemnity, is diminished by the amount of his indebtedness. *In re Johnson*; *Shearman v. Robinson*, 15 Ch. D. 548; *Strickland v. Symons*, 22 Ch. D. 666; 26 Ch. D. 245; *In re Evans*; *Evans v. Evans*, 34 Ch. D. 597; see *Re Kidd*; *Kidd v. Kidd*, 70 L. T. 648; 42 W. R. 571.

As between the creditors who have become such since the testator's death and the beneficiaries under the will, the rights depend upon the directions of the will, and for this purpose persons dealing with the executor must be taken to know the contents of the will. If the will does not authorise the executor to carry on the business, he has no right to an indemnity, and his creditors have no right against the estate.

Rights as
between cre-
ditors of
executor and
beneficiaries.

Similarly, if the will confers authority to carry on the business for a limited period, which has come to an end, creditors, whose debts are incurred after that period, have no claim against the estate. *Gallagher v. Ferris*, 7 L. R. Ir. 489.

Nothing in the will can affect the rights of the testator's creditors. As against them, therefore, the executor carrying on the business is entitled to indemnity only if the carrying on was reasonable in order to pay the debts, or if the creditors assented to the business being carried on.

Rights as
between cre-
ditors of
testator and
of executor.

If it was not reasonable, or there was no assent, it is open to the testator's creditors to repudiate the executor's act and to treat it as a devastavit or to adopt it, in which case the executor is entitled to be indemnified against the debts he has incurred. Through the medium and to the extent of this indemnity the

Chap. XXXI.

executor's creditors may acquire priority over the testator's creditors. The same result follows if the creditors stand by and allow the business to be carried on. *Dowse v. Gorton*, (1891) A. C. 190; *In re Brooke*; *Brooke v. Brooke*, (1894) 2 Ch. 600.

No distinction can for this purpose be drawn between the testator's estate at his death and assets subsequently created by the executor. *Dowse v. Gorton*, (1891) A. C. 190.

As to the rights of the testator's creditors as against creditors whose debts are incurred after his death, see *Ex parte Morley*, 8 Ch. 1026; *In re Simpson*, 9 Ch. 572; *In re Fells*; *Ex parte Andrews*, 4 Ch. D. 509; *Ex parte Butcher*; *In re Mellor*, 13 Ch. D. 465; *Ex parte Barber*; *In re Anslow*, 28 W. R. 522.

XIII. Power
of maintenance.

Sect. 43 of the Conveyancing and Law of Property Act, 1881 (44 & 45 Vict. c. 41) provides that "where any property is held by trustees in trust for an infant, either for life or for any greater interest, and whether absolutely or contingently on his attaining the age of twenty-one years or on the occurrence of any event before his attaining that age, the trustees may, at their sole discretion, pay to the infant's parent or guardian, if any, or otherwise apply for or towards the infant's maintenance, education or benefit the income of that property or any part thereof whether there is any other fund applicable to the same purposes or any person bound by law to provide for the infant's maintenance or education or not."

The residue of the income is to be accumulated and go to the person ultimately entitled to the property, but the trustees may apply accumulations as if they were income of the current year.

The section applies to all instruments if there is no contrary intention expressed.

An express trust to accumulate the income of infant's shares is not a contrary intention. *In re Thatcher's Trusts*, 26 Ch. D. 426.

This power appears to be practically the same as that contained in Lord Cranworth's Act (23 & 24 Vict. c. 145), sect. 26. It enables income to be applied for maintenance in cases where the gift of capital and income is contingent, but not where the legacy does

not carry interest. *In re Cotton*, 1 Ch. D. 232; *In re George*, 5 Ch. D. 837; *In re Judkin's Trusts*, 25 Ch. D. 743; *In re Dickson*; *Hill v. Grant*, 28 Ch. D. 291; 29 Ch. D. 331; *In re Holford*; *Holford v. Holford*, (1894) 3 Ch. 30 : see *ante*, p. 148. Chap. XXXI.

The power of maintenance does not extend beyond the age of twenty-one. *In re Breeds' Will*, 1 Ch. D. 226.

Under a power to apply money towards the maintenance or support of infants, sums may be expended on education. *In re Breeds' Will*, 1 Ch. D. 226. Education.

Discretionary powers of maintenance may be variously expressed. Discretionary powers.

a. The trustees may be bound to apply the income in maintenance, but they may have a discretion as to the amount, or as to the time and mode of application. In such cases the Court will control the exercise of the discretion, and will require the income to be applied in the way in which it would have been applied by the Court. *In re Hodges*; *Davey v. Ward*, 7 Ch. D. 754; *In re Roper's Trusts*, 11 Ch. D. 272. Discretion as to amount.

Thus the trustees will be bound to apply the income of a life interest, over which their discretion extends, in exoneration of property to which the infant is absolutely entitled. *In re Weaver*, 21 Ch. D. 615; see *In re Wells*; *Wells v. Wells*, 43 Ch. D. 281.

And the trustees ought not to pay the income to a father who is not unable to maintain the children, and if they do so the father must account for what he has received. *Thompson v. Griffin*, Cr. & Ph. 317; *Wilson v. Turner*, 22 Ch. D. 521; overruling *Ransome v. Burgess*, 3 Eq. 773; see *Malcomson v. Malcomson*, 17 L. R. Ir. 69.

b. Or again the maintenance clause may be so framed as to give the trustees an absolute discretion as to whether they shall apply anything at all for maintenance, or there may be a direction that the trustees are not to be controlled. Absolute discretion.

In such cases the Court will not interfere with the discretion of the trustees. *Gisborne v. Gisborne*, 2 App. C. 300; *Tabor v. Brooks*, 10 Ch. D. 273; *In re Bryant*; *Bryant v. Hickley*, (1894) 1 Ch. 324; see *In re Lofthouse*, 29 Ch. D. 921.

Chap. XXXI.

The trustees may exercise their discretion after the fund has been paid into Court in a suit. *Brophy v. Bellamy*, 8 Ch. 798.

But if the trustees pay the fund into Court under the Trustee Relief Act their discretion is at an end. *In re Williams' Settlement*, 4 K. & J. 87; *In re Mulqueen's Trusts*, 7 L. R. Ir. 127.

Trust for
maintenance.

c. If there is a trust to apply the income for maintenance, the income must be so applied, and if the father has himself maintained his children he is entitled to be recouped out of the income of the fund. *Stocken v. Stocken*, 4 Sim. 152; 4 M. & Cr. 95; *Meacher v. Young*, 2 M. & K. 490.

This rule would probably not now be applied when the trust is to apply the whole or part of the income at the discretion of the trustees. *In re Kerrison's Trusts*, 12 Eq. 422; see *Wilson v. Turner*, 22 Ch. D. 521; where *Mundy v. Earl Howe*, 4 B. C. C. 224, is considered.

The distinction which has been made on this subject between voluntary gifts and marriage settlements cannot now be upheld. See *Wilson v. Turner*, *supra*.

For the principles upon which maintenance may be allowed to infants by the Court contrary to the terms of the will, see *Havelock v. Havelock*; *In re Allan*, 17 Ch. D. 807 (doubted in *Re Smeed*; *Archer v. Prall*, 54 L. T. 929); *In re Colgan*, 19 Ch. D. 305; *Kemmis v. Kemmis*, 13 L. R. Ir. 372; 15 *ib.* 90; *Re Tanner*, 51 L. T. 507; *In re Collins*; *Collins v. Collins*, 32 Ch. D. 229; *In re Alford*; *Hunt v. Parry*, 32 Ch. D. 383.

Sums ex-
pended with-
out authority.

A trustee who has, without authority, expended sums for the maintenance of an infant, will be allowed all such sums as the Court would have authorised if it had been applied to. *Brown v. Smith*, 10 Ch. D. 377.

When a guardian pays an infant's income to his co-guardian by whom the infant is properly maintained, the guardian will be allowed such a sum as was proper to be allowed for the maintenance of the infant without vouching the details. *In re Evans*; *Welch v. Chennell*, 26 Ch. D. 58.

The Court has jurisdiction on a summary application to direct past maintenance to be charged on an infant's freehold estate in possession. *In re Howarth*, 8 Ch. 415.

But no such charge can be created for future maintenance, nor can it be created where the estate is in reversion. *In re Hamilton*, 31 Ch. D. 291; *Cadman v. Cadman*, 33 Ch. D. 397. Chap. XXXI.

It seems that accumulations of income may be applied in maintenance in subsequent years without express authority. *Edwards v. Grove*, 2 D. F. & J. 210.

Powers of advancement are not, in the absence of express words, to be confined to minority. *Clarke v. Hogg*, 19 W. R. 617; see *Re Aldridge*; *Abram v. Aldridge*, 54 L. T. 827; 55 L. T. 554. XIV. Power of advancement.

A power of advancement, exerciseable with the consent of the tenant for life, may be exercised after the bankruptcy of the tenant for life with his consent and that of his trustee in bankruptcy. *In re Cooper*; *Cooper v. Slight*, 27 Ch. D. 565.

A power of advancement would not justify the payment of a sum to a beneficiary merely to put into his own pocket. But it would justify the payment of a sum for the purpose of making a settlement on the family of the beneficiary if he has no property producing income. *Roper Curzon v. Roper Curzon*, 11 Eq. 452.

A power of advancement may justify payment of a marriage portion to a daughter. *Lloyd v. Cocker*, 27 B. 645. Marriage portion.

Such a power would not justify a payment to the husband of a beneficiary without some security for the repayment of the amount. *Talbot v. Marshfield*, 3 Ch. 622; *In re Kershaw's Trusts*, 6 Eq. 322. Payment to husband.

A power to apply a sum for the preferment, advancement, or otherwise for the benefit of a legatee authorises the payment of his debts. *Lowther v. Bentinck*, 19 Eq. 166; see *In re Brittlebank*; *Coates v. Brittlebank*, 30 W. R. 99. Payment of debts.

A discretionary power of advancement is at an end if trustees pay the fund into Court under the Trustee Relief Act. *In re Ashburnham's Trust*, 54 L. T. 84; *In re Nettlefold's Trusts*, 59 L. T. 315.

If there is no express power to appropriate, a legatee is bound by an investment of the sum to which he is entitled in consols. If the gift is of so much a year, the investment must be of so XV. Appropriation.

Chap. XXXI.

Direction to appropriate in named securities.

Effect of Trustee Act.

Effect of valid appropriation.

much in the two and a half per Cents. as will produce the amount. See *In re Outhwaite* ; *Outhwaite v. Taylor*, (1891) 3 Ch. 494.

If there is a direction to appropriate by investment in particular securities, the legatee is not bound unless the direction is strictly followed. *Prendergast v. Prendergast*, 3 H. L. 195 ; *Stewart v. Sanderson*, 10 Eq. 26.

In such a case the Trustee Act, 1893 (56 & 57 Vict. c. 53), sect. 1, does not enable the trustees to bind the legatee by an investment in any securities authorised by that Act, but not specified by the testator, except, perhaps, consols. *In re Outhwaite* ; *Outhwaite v. Taylor*, (1891) 3 Ch. 494.

A direction to appropriate by investment in a particular security is satisfied by appropriating a security of the kind specified, which already forms part of the estate. *Ames v. Parkinson*, 7 B. 379.

If one share of residue becomes payable before another share, the executors or trustees may arrange with the residuary legatee, whose share is payable, what securities he is to take, and as long as the division is fairly made, it cannot afterwards be attacked on the ground that the rest of the estate has diminished. The trustees are not bound either to turn the whole estate into cash for purposes of division, nor are they bound to divide each investment specifically. *In re Lepine* ; *Dowsett v. Culver*, (1892) 1 Ch. 210.

The effect of a valid appropriation is that the legatee can look only to the appropriated sum. If it diminishes in value he must bear the loss. If it increases in value he gets the benefit. On the other hand, he is not affected by any diminution in value of the rest of the estate, and after appropriation the executor cannot claim any indemnity against the appropriated sum for liabilities incurred by him in respect of other parts of the estate, nor can he retain any part of the appropriated sum against a debt due from the legatee. *Ex parte Chadwin*, 3 Sw. 380 ; *Peterson v. Peterson*, 3 Eq. 111 ; *Ballard v. Marsden*, 14 Ch. D. 374 ; *Fraser v. Murdoch*, 6 App. C. 855.

On the other hand a legatee whose legacy has not been appropriated, is not entitled to share in an increase in the

value of the residue before appropriation, although the executor is also a residuary legatee. *In re Campbell; Campbell v.* Chap. XXXI.

* *Campbell*, (1893) 3 Ch. 468.

An indemnity clause, providing that any trustee enabling his co-trustee to receive any moneys should not be liable to see to the application thereof, has been held to protect a trustee against misappropriation of the trust fund by his co-trustee. *Wilkins v. Hogg*, 3 Giff. 116; 10 W. R. 47; *Pass v. Dundas*, 29 W. R. 332. XVI. In-
demnity.

Trustees are of course entitled to be indemnified out of the trust estate against liabilities they incur.

But if they properly appropriate certain funds to a particular legacy, their right to indemnity against the appropriated fund, for liabilities incurred, with reference to other parts of the estate, is gone. *Fraser v. Murdoch*, 6 App. C. 855.

A direction that a solicitor trustee is to be allowed to charge for professional services will be limited strictly to professional services, unless there are words extending the direction to non-professional charges. *Harbin v. Darby*, 28 B. 325; *In re Ames*; *Ames v. Taylor*, 25 Ch. D. 72; *In re Chapple*; *Newton v. Chapman*, 27 Ch. D. 584; *In re Fish*; *Bennett v. Bennett*, (1893) 2 Ch. 413. XVII. Costs.

A power to trustees to decide questions does not oust the jurisdiction of the Court. *Massy v. Rogers*, 11 L. R. Ir. 409. XVIII. Power
to decide
questions

CHAPTER XXXII.

ABSOLUTE INTERESTS IN PERSONALTY.

I. BEQUESTS OF PERSONALTY WITH WORDS OF LIMITATION.

Chap. XXXII.

Bequest to A.
and his
executors or
representa-
tives.

1. It is clear that a bequest to A. and his executors, or to A. and his representatives, gives A. the absolute interest, the additional words being merely words of limitation. *Lugar v. Harman*, 1 Cox, 250; *Taylor v. Beverley*, 1 Coll. 108; *Appleton v. Rowley*, 8 Eq. 139.

Bequest to A.
for life and
then to his
executors.

So, too, a gift to A. for life, and then to his executors or administrators, or to his personal representatives, gives A. the absolute interest. *A.-G. v. Malkin*, 2 Ph. 64; *Saberton v. Skeels*, 1 R. & M. 587; *Alger v. Parrott*, L. R. 3 Eq. 328; *Avern v. Lloyd*, 5 Eq. 383; *Wing v. Wing*, 24 W. R. 878.

It is of course immaterial, that the life interest is determinable. *Webb v. Sadler*, 14 Eq. 533; 8 Ch. 419.

In what case
the executors
take bene-
ficially.

If, however, the gift is to A. for life, and then to his executors or administrators for their own use and benefit, they will take beneficially. *Sanders v. Franks*, 2 Mad. 147; *Wallis v. Taylor*, 8 Sim. 241.

But the intention that the executors are to take beneficially must be unmistakeably plain. *Stocks v. Dodsley*, 1 Kee. 325.

A gift to A. for life with power to appoint by will and in default of appointment to his executors and administrators, gives an absolute interest and entitles the donee to immediate payment, and it is apparently not necessary that the power should be released. *Devall v. Dickens*, 9 Jur. 550; *Page v. Soper*, 11 Ha. 321.

Bequest to A.
and his heirs.

2. A bequest of personalty to a man and his heirs would no doubt pass the absolute interest.

Bequest to A.
and the heirs
of his body.

So, too, a bequest to A. and the heirs of his body, or to A. and the heirs of his body in equal proportions, gives A. an

absolute interest in personalty. *Leventhorpe v. Ashbie*, Rolle's Ab. 831, pl. 1; *Seale v. Seale*, 1 P. W. 290; *In re Barker's Trusts*, 52 L. J. Ch. 565. Chap. XXXII.

It seems that in wills before the Wills Act, if the gift is to A. for life, and if he die without issue over, an absolute interest will not be given to A. by implication, though if the property had been real estate, A. would have taken an estate tail. *Procter v. Upton*, cit. 5 D. M. & G. 199 n; *In re Banks' Trust*; *Ex parte Hovill*, 2 K. & J. 387; see *A.-G. v. Bayley*, 2 B. C. C. 553; *Chandless v. Price*, 3 Ves. 98; *Bodens v. Lord Galway*, 2 Ed. 297.

Bequest to A. for life and if he dies without issue over before the Wills Act.

On the other hand, a gift to A. for life and then to the heirs of his body, and if he die without issue over, gives A. an absolute interest. *Butterfield v. Butterfield*, 1 Ves. Sen. 133; *Theebridge v. Kilburne*, 2 Ves. Sen. 233; *Williams v. Lewis*, 3 Dr. 669; 6 H. L. 1013; see, too, *Elton v. Eason*, 19 Ves. 73; *Garth v. Baldwin*, 2 Ves. Sen. 646; *Tothill v. Pitt*, 1 Mad. 488; 7 B. P. C. 453; *Brouncker v. Bagot*, 19 Ves. 574; 1 Mer. 271.

Bequest to A. for life and then to the heirs of his body followed by a gift over.

Of course if, in wills before the Wills Act, the gift over upon failure of issue can be limited to failure of issue at the death of the tenant for life, a prior gift to A. and the heirs of his body gives A. an interest defeasible upon failure of issue at his death. *Read v. Snell*, 2 Atk. 642; *Hodgeson v. Bussey*, 2 Atk. 89; *Paine v. Stratton*, 2 Atk. 647; 3 B. P. C. 257; *Fearne*, C. R. 494.

In these cases the testator has shown a clear meaning, that the property should go in a course of devolution, till there is an exhaustion of heirs of the body; and, as this intention cannot be carried into effect, the Court gives an absolute interest in personalty. See *Ex parte Wynch*, 5 D. M. & G. 188.

But if such an intention is not manifested, it seems that the Courts will be unwilling to apply the rules of tenure to personal estate, and it must be collected from the general language of the will, whether the words heirs and heirs of the body are intended to be words of limitation or purchase.

In what cases heirs of the body will be a word of limitation in bequests since the Wills Act.

A gift to A. for life and to her heirs after her is an absolute gift. *Atkinson v. L'Estrange*, 15 L. R. Ir. 340.

And, if the bequest is to A. for life, and after her decease to

Chap. XXXII.

her heirs as she shall give it by will, and if she die without a will to her right heirs for ever, the term right heirs is equivalent to executors and administrators. *Powell v. Boggis*, 35 B. 535.

So if the intention is to create a succession of estates, as in a gift to A. for life and after his decease to the heirs male of his body, and so in succession, A. takes an absolute interest. *Britton v. Twining*, 3 Mer. 176; see *Cleary's Trust*, 16 Ir. Ch. 438; *Sparling v. Parker*, 29 B. 450.

Words of distribution superadded make the word heirs a word of purchase.

But if there is anything to show that the heirs were to take by purchase; if, for instance, they are to take as tenants in common, the life estate will not be enlarged, whether there is a gift over in default of issue or not. *Bull v. Comberbach*, 25 B. 540; *Jacobs v. Amyott*, 4 B. C. C. 542; *Jeaffreson's Trust*, L. R. 2 Eq. 276; see, too, *In re Russell*, 53 L. J. Ch. 400; revd. 52 L. T. 559.

So, too, in a gift to A. for life with a direction that he was to have no power over the property beyond its legal vestment for conveyance, &c., and after his decease to his heirs, A. took only a life interest in the personalty, though he took the realty in fee. *Herrick v. Franklin*, 6 Eq. 598; see *Comfort v. Brown*, 10 Ch. D. 146.

Whether the same construction will be adopted as regards realty and personalty where they are given together.

The better opinion seems now to be, that the Court will not shrink from giving a different construction to the words heirs and heirs of the body as regards realty and personalty, though given together in the same clause. *Herrick v. Franklin*, *supra*.

3. The word issue is less "mysteriously inflexible" than the words heirs of the body, and therefore in a gift of personalty to A. and his issue it may be a word of limitation or of purchase, in which latter case the same question arises as in gifts to A. and his children, whether A. and the issue take jointly or whether the issue take subject to a life interest in A.

Bequests to a person and his issue.

a. Primâ facie it seems a gift of personalty to A. and his issue, as it would give A. an estate tail in realty, gives him an absolute interest in personalty. This seems clear, when there is a gift over in default of issue, for the limitation over shows, that the gift is meant to extend to all the issue, and all the issue might not be capable of taking jointly with the parent.

Lyon v. Michell, 1 Mad. 467; *Beaver v. Nowell*, 25 B. 551; *Re Andrews' Will*, 27 B. 608; *Donn v. Penny*, 1 Mer. 20; 19 Ves. 544; *Gibbs v. Tait*, 8 Sim. 132. Chap. XXXII.

And apparently the same rule will hold good even where there is no gift over. *Harvey v. Towell*, 7 Ha. 231; *Samuel v. Samuel*, 9 Jur. 222; *Prentice v. Brooke*, 5 L. R. Ir. 435; but *quære*.

The case is stronger in favour of this construction, if it is a gift of realty and personalty together, or if personalty is directed to go in the same way as realty. *Parkin v. Knight*, 15 Sim. 83; *Tate v. Clarke*, 1 B. 100.

b. If, however, there is any evidence, that the testator did not use the word as a word of limitation, by the use of expressions implying, either that the parent and issue take concurrently: *Clay v. Pennington*, 7 Sim. 370; *Law v. Thorp*, 27 L. J. Ch. 649; or that the issue take after the parent's death as purchasers: *Lampley v. Blower*, 3 Atk. 396; *Parsons v. Coke*, 4 Dr. 296; or that they are to take by substitution, by directing, for instance, that the issue are to take *per stirpes*: *Butter v. Ommamey*, 4 Russ. 70; *Pearson v. Stephen*, 5 Bl. N. S. 203; *Dick v. Lacy*, 8 B. 214; *Re Stanhope's Trusts*, 27 B. 201; the issue will take by purchase.

In what cases issue will be a word of purchase.

c. If the gift of personalty is to A. for life and then to his issue, whether there is a gift over in default of issue or not, A. takes only an estate for life. *Knight v. Ellis*, 2 B. C. C. 569; *Ex parte Wynch*, 5 D. M. & G. 188; *Goldney v. Crabb*, 19 B. 338; *Foster v. Wybrants*, 1. R. 11 Eq. 40.

Bequests to A. for life and then to his issue.

And the same rule applies with regard to the personalty, where real and personal property are given together, unless there is something to show that the personalty was to go in the same manner as the realty.

"Except in a case where the personalty is either quite subordinate in value or a mere adjunct of the realty, as, for example, a leasehold garden held together with a freehold house, it is very difficult to give any sound logical reason for the proposition, that an intention that the two kinds of property should go together ought to carry the whole in accordance with the rules applicable to realty rather than those which

Chap. XXXII. would apply to a bequest of personalty alone." *Per* Lord Hatherley, *Jackson v. Calvert*, 1 J. & H. 235.

But, though only a life estate may be given to the ancestor, if the issue are to take successively according to seniority, and not conjointly, issue will be treated as a word of limitation. *Jordan v. Lowe*, 6 B. 350.

II. GIFTS OF THE INCOME OF PROPERTY INDEFINITELY.

A gift of the income of property to a person, without limitation as to time, is a gift of the capital, where no other disposition of the capital is made.

Gift of income
without more
is a gift of
corpus.

This is the case, though the gift may be to the separate use, or through the medium of a trust. *Elton v. Shepherd*, 1 B. C. C. 532; *Phillips v. Chamberlayne*, 4 Ves. 51; *Rawlings v. Jennings*, 13 Ves. 39; *Boosey v. Gardner*, 18 B. 471; *Haig v. Swiney*, 1 S. & St. 487; *Humphrey v. Humphrey*, 1 Sim. N. S. 536; *Watkins v. Weston*, 32 B. 238; 3 D. J. & S. 434; *Penny v. Pippin*, 15 W. R. 306; *In re Tandy*; *Tandy v. Tandy*, 34 W. R. 748; *Re Coward*; *Coward v. Larkman*, 56 L. T. 278; 57 L. T. 285; 60 L. T. 1; *In re Morgan*; *Morgan v. Morgan*, (1893) 3 Ch. 222; see *In re L'Herminier*; *Mounsey v. Buston*, (1894) 1 Ch. 675.

Income
during widow-
hood.

A gift of income during widowhood is a gift for life or during widowhood; but a gift of income to a legatee so long as she should continue single and unmarried has been held to be an absolute interest if the legatee did not marry. *Rishton v. Cobb*, 5 M. & Cr. 145; see 25 Ch. D. 689.

In the same way a gift of the income of property, with a power superadded of disposing of it by will, is an absolute interest. *Southouse v. Bate*, 16 B. 132; *Weale v. Olive*, 32 B. 421.

The fact, that legacies are given at the decease of the person, to whom the income is given indefinitely, will only cut down the absolute interest to the extent of the legacies. *Jennings v. Baily*, 17 B. 118.

Upon similar principles a gift of income to A. for life, and then to B. indefinitely, gives B. the absolute interest. *Clogh v. Wynne*, 2 Mad. 188.

But a gift of income to B. and C. and the survivor of them gives them only life interests. *Blann v. Bell*, 2 D. M. & G. 775; see *In re Tandy*; *Tandy v. Tandy*, 34 W. R. 748. Chap. XXXII.
Contrary intention.

III. PROPERTY AND POWER.

1. A gift to be at the disposal of A. is an absolute gift. *Nowlan v. Walsh*, 4 De G. & S. 584; *Re Maxwell's Will*, 24 B. 246; *Hoy v. Master*, 6 Sim. 568; *Kellett v. Kellett*, L. R. 3 H. L. 160. Gift to be at the disposal of a person.

The same construction has been adopted where property has been directed to be at the disposal of A. by will, or after his death. *Robinson v. Dugate*, 2 Vern. 180; *Hixon v. Oliver*, 13 Ves. 108.

2. If there is a gift to A. in general terms, a superadded power to dispose of the property in question by will, or at the donee's death, does not cut down the absolute gift. *Southouse v. Bate*, 16 B. 132; *Weale v. Ollive*, 32 B. 421; *Comber v. Graham*, 1 R. & M. 450; *Re Mortlock's Trust*, 3 K. & J. 456. See *Hales v. Margerum*, 3 Ves. 299; and *Bull v. Kingston*, 1 Mer. 314. Effect of a power super-added to an absolute gift.

So a devise of lands in fee to the intent that the devisee may enjoy the same for life and by will dispose of the same, gives the devisee the fee. *Doe d. Herbert v. Thomas*, 3 A. & E. 123.

And even a superadded power to dispose of the property among a particular class will not cut down the absolute interest previously given. *Howarth v. Dewell*, 29 B. 18; *Brook v. Brook*, 3 Sm. & G. 280; *Reeves v. Baker*, 18 B. 372.

Of course a mere power to dispose of property among a certain class gives no property to the donee of the power. *Birch v. Wade*, 3 V. & B. 198; *Blakeney v. Blakeney*, 6 Sim. 52. See *Acheson v. Fair*, 3 Dr. & War. 512.

3. But if the gift is to A. for life, with a superadded power to dispose of the whole for his own benefit, A. takes only a life interest if he does not exercise the power. *Archibald v. Wright*, 9 Sim. 161; *Bradley v. Westcott*, 13 Ves. 445; *Reith v. Seymour*, 4 Russ. 263; *Scott v. Josselyn*, 36 B. 174; *Pennock v. Pennock*, 13 Eq. 144; *In re Stringer's Estate*; *Shaw v. Jones-Ford*, Effect of a power super-added to a life interest.

Chap. XXXII. 6 Ch. D. 1; *In re Thomson's Estate*; *Herring v. Barrow*, 14 Ch. D. 263; *In re Pounder*; *Williams v. Pounder*, 56 L. J. Ch. 118; 56 L. T. 104.

And when the tenant for life has power to go to the principal, only if the income is insufficient, she is entitled only to so much of the capital as will afford a suitable maintenance. *Re Pedrotti's Will*, 27 B. 583; see *Re Fox*; *Fox v. Fox*, 62 L. T. 762.

Gifts for life with power to appoint and in default to executors.

4. A gift to A. for life with remainder as A. shall by deed or will appoint, with a limitation in default of appointment to his executors and administrators, is an absolute gift, and the fund may be paid over to the legatee without an appointment. *Holloway v. Clarkson*, 2 Ha. 521; *Cambridge v. Rous*, 25 B. 574.

The result is the same if the power to appoint is by will only. *Devall v. Dickens*, 9 Jur. 550; *Page v. Soper*, 11 Ha. 321; *In re Onslow*; *Plowden v. Gayford*, 39 Ch. D. 622; *In re Davenport*; *Turner v. King*, (1895) 1 Ch. 361.

And under a gift to A. to be by her enjoyed absolutely during her life and disposed of as she shall think fit at her death, there being no gift in default of appointment, A. was held absolutely entitled to the fund. *In re Davids' Trusts*, Jo. 495.

IV. EFFECT OF SUBSEQUENT RESTRICTIONS UPON ABSOLUTE INTERESTS.

In some cases there is an absolute gift in the first instance, out of which particular interests are subsequently carved. In such cases the rule is :—

Absolute interests cut down for a particular purpose remain so far as those purposes do not take effect.

“If a testator leave a legacy absolutely as regards his estate, but restricts the mode of the legatee's enjoyment of it to secure certain objects for the benefit of the legatee, upon failure of such objects the absolute gift prevails. But if there be no absolute gift as between the legatee and the estate, but particular modes of enjoyment are prescribed, and those modes of enjoyment fail, the legacy forms part of the testator's estate, as not having in such event been given away from it. In the latter case the gift

is only for a particular purpose; in the former the purpose is the benefit of the legatee as to the whole amount of the legacy, and the directions and restrictions are to be considered as applicable to a sum no longer part of the testator's estate, but already the property of the legatee." *Per* Lord Cottenham, *Lassence v. Tierney*, 1 Mac. & G. 551.

Chap. XXXII.

Thus, if there is an absolute gift by a will, and restrictions are imposed upon the legatee's enjoyment by a codicil, the absolute gift remains so far as the restrictions do not extend. *Norman v. Kynaston*, 3 D. F. & J. 29; *Watkins v. Weston*, 3 D. J. & S. 434.

So when there is a valid appointment to objects of a power, with limitations or restrictions which are beyond the power, the invalid restrictions may be rejected. *Stephen v. Gadsden*, 20 B. 463; *Gerrard v. Butler*, *ib.* 541; *Churchill v. Churchill*, 5 Eq. 44; *Webb v. Sadler*, 14 Eq. 533; 8 Ch. 419.

But where there is no absolute gift, the legatees can take no more than is given them. *Savage v. Tyers*, 7 Ch. 356.

The difficulty in these cases lies in ascertaining, whether there is an absolute gift in the first instance or not. The question is whether the original gift is qualified by the words in which it is given: *Scawin v. Watson*, 10 B. 200; *Gompertz v. Gompertz*, 2 Ph. 107; *Lassence v. Tierney*, 1 Mac. & G. 551; *Harris v. Newton*, 25 W. R. 228; 46 L. J. Ch. 268; *Re Richards*; *Williams v. Gorvin*, 50 L. T. 22; or whether there is an independent gift, with a direction as to the mode of its enjoyment. *Campbell v. Brownrigg*, 1 Ph. 301; *Whittell v. Dudin*, 2 J. & W. 279; *Winckworth v. Winckworth*, 8 B. 576; *Mayer v. Townshend*, 3 B. 443; *McTear v. McDowell*, 11 Ir. Ch. 338; *Welpley v. Cormick*, 16 Ir. Ch. 74; *Kellett v. Kellett*, L. R. 3 H. L. 160.

What is an absolute gift in the first instance.

When an absolute interest is cut down to a life estate, with a power of appointment among children, this does not mean that the absolute interest is to be cut down, only if the donee appoints, but if there are children the donee is bound to appoint to them. *Butler v. Gray*, 5 Ch. 26.

Power and trust.

Upon the question to whom a fund results where the trusts of the settlement fail, see *In re Nash's Trusts*, 30 W. R. 406.

V. GIFTS BENEFICIAL OR IN TRUST.

On the question whether a gift is beneficial or in trust, the cases are numerous. The inclination of the Courts is not to construe doubtful words into a declaration of trust, and many of the earlier cases in which a trust has been held to be created would probably now be differently decided. See *In re Diggles*; *Gregory v. Edmondson*, 39 Ch. D. 253.

Words sufficient to create a trust.

A. A gift to a person for some particular purpose, whether declared or not, creates a trust. *Corporation of Gloucester v. Wood*, 3 Ha. 131; 1 H. L. 272; *Aston v. Wood*, 6 Eq. 419; see *Barrs v. Fewkes*, 2 H. & M. 60; 12 W. R. 666; 13 W. R. 987.

So, too, the words "to the intent" create a trust. *Raikes v. Ward*, 1 Ha. 445.

Where a residue was given to A. for his own use and benefit and at his discretion for the further use and benefit of B., it was held that A. took the residue as trustee for himself and B. as joint tenants. *Atkinson v. Atkinson*, 62 L. T. 735.

And where an executrix had received a legacy for her trouble, a bequest of the residue to her, "well knowing that she will make a good use and dispose of it in a manner in accordance with my views and wishes," was held to be in trust. *Briggs v. Penny*, 3 De G. & S. 525; 3 Mac. & G. 546; *Bernard v. Minshull*, Johns. 276; see *Stead v. Mellor*, 5 Ch. D. 225.

But where a testator gave his residuary real and personal property to his wife, whom he also appointed sole executrix, "well knowing that she will religiously carry out what she knows to be my wishes in the disposal of it," it was held that she took absolutely. *Clancarty v. Clancarty*, 31 L. R. Ir. 530.

Precatory trusts.

B. The cases are more difficult, where the intention is to give the donee a beneficial interest, but there is a recommendation to apply the property for the benefit of certain objects. In such cases the Court will imply a trust if the property to be subject to, and the objects to be benefited by, the implied trust are sufficiently certain.

1. It must be clear that the testator intends the property he has bequeathed, or some part of it, to be applied by the donee for the purposes of the trust.

Chap. XXXII.

It must be clear what property is to be subject to the trust.

a. Therefore mere expressions of a desire that the donee will be kind to: *Buggins v. Yates*, 9 Mod. 122; 8 Vin. Ab. 72, pl. 27; remember: *Bardswell v. Bardswell*, 9 Sim. 319; consider: *Sale v. Moore*, 1 Sim. 534; deal justly by: *Pope v. Pope*, 10 Sim. 1; educate and provide for: *Macnab v. Whitbread*, 17 B. 299; *Winch v. Brutton*, 14 Sim. 379; *Fox v. Fox*, 27 B. 301; *Morrin v. Morrin*, 19 L. R. Ir. 37; take care of: *In re Moore*; *Moore v. Roche*, 55 L. J. Ch. 418; 54 L. T. 231; 34 W. R. 343; or do justice to: *Ellis v. Ellis*, 23 W. R. 382, a certain class of persons will raise no trust.

b. Though some property may be mentioned out of which the trust is to be performed, this is not enough, if it is not clear what the property is; as if the donee is requested to give "whatever she can transfer:" *Flint v. Hughes*, 6 B. 342; or the bulk: *Palmer v. Simmonds*, 2 Dr. 221; or "when no longer required by her:" *Mussoorie Bank v. Raynor*, 7 App. C. 321, P. C.; or if the precatory words apply not only to the property given by the testator, but to all the property of the legatee: *Eade v. Eade*, 5 Mad. 118; *Lechmere v. Lavie*, 2 M. & K. 197; *Parnall v. Parnall*, 9 Ch. D. 96. See *Knight v. Boughton*, 3 B. 148; 11 Cl. & F. 513.

c. As there can be no gift over of what a legatee does not dispose of, so no trust will be fixed upon it. *Bland v. Bland*, 2 Cox, 349; *Wilson v. Major*, 11 Ves. 205; *Pushman v. Filliter*, 3 Ves. 7; *Cowman v. Harrison*, 10 Ha. 234; *Green v. Marsden*, 1 Dr. 646; see *In re Pounder*, 56 L. J. Ch. 113.

2. If the donee has a wide discretion as to the objects to be benefited, so that it is uncertain whom the testator meant, the Court will infer that precatory words were not intended to create an imperative trust. *Bernard v. Minshull*, Jo. 276, 287.

The objects of the trust must be reasonably certain.

a. Thus, where there is absolute power of disposal, with a confidence expressed, that the donee will dispose of the property according to the testator's wishes, where none are expressed,

Chap. XXXII. there is no trust. *Reid v. Atkinson*, 1 R. 5 Eq. 162, 373; *Creagh v. Murphy*, 1 R. 7 Eq. 182.

b. Though words are used, such as "family," "relations," or "heirs," to which the Court would give a meaning in a direct gift, no trust will be implied if it is uncertain what the testator meant by them. *Harland v. Trigg*, 1 B. C. C. 142; *Wright v. Atkyns*, 17 Ves. 255; 1 V. & B. 313; 19 Ves. 299; T. & R. 148; Sug. Prop. 388; *Williams v. Williams*, 1 Sim. N. S. 358; *Green v. Marsden*, 1 Dr. 646; *Meredith v. Heneage*, 1 Sim. 542; *Greene v. Greene*, 1 R. 3 Eq. 90, 629.

Precatory words may be explained so as not to raise a trust.

3. No trust will be implied from precatory words:

a. Where the donee may at his discretion apply the property to other purposes. *Lefroy v. Flood*, 4 Ir. Ch. 1; *Curtis v. Rippon*, 5 Mad. 434; *House v. House*, 23 W. R. 22; *Ex parte Payne*, 2 Y. & C. Ex. 636.

b. Or where there is an express direction that the donee's absolute interest is not to be curtailed. *Huskinson v. Bridge*, 15 Jur. 738; *Eaton v. Watts*, 4 Eq. 151.

c. Where the precatory words are stated not to be obligatory. *Young v. Martin*, 2 Y. & C. C. 582; *Shepherd v. Nottidge*, 2 J. & H. 766; *In re Bond*; *Cole v. Hawes*, 4 Ch. D. 238.

d. Or where the donee is to take free and unfettered. *Meredith v. Heneage*, 1 Sim. 542; 10 Pr. 306; *Hoy v. Master*, 6 Sim. 568; *White v. Briggs*, 15 Sim. 33.

What words are sufficient to raise a precatory trust.

4. Where, however, there is sufficient certainty on the points already mentioned, a trust may be implied from any of the following expressions:

a. Words of confidence, such as "trusting:" *Baker v. Mosley*, 12 Jur. 740; *Irvine v. Sullivan*, 8 Eq. 673; "confiding:" *Griffiths v. Evan*, 5 B. 241; "not doubting:" *Parsons v. Baker*, 18 Ves. 476; "firm conviction:" *Barnes v. Grant*, 26 L. J. Ch. 92.

b. Words of request and entreaty, such as "entreat:" *Prevost v. Clarke*, 2 Mad. 458; "require and entreat:" *Taylor v. George*, 2 V. & B. 378; "wish and request:" *Foley v. Parry*, 5 Sim. 138; 2 M. & K. 138; "dying request:" *Pierson v. Garnet*, 2 B. C. C. 38, 226; "request:" *Eade v. Eade*, 5 Mad.

118; "beg:" *Corbet v. Corbet*, I. R. 7. Eq. 456; "dying wish:" Chap. XXXII
Godfrey v. Godfrey, 11 W. R. 554; "last will:" *Hinaman v. Poynder*, 5 Sim. 546; "wish and desire:" *Liddard v. Liddard*, 28 B. 226; see *Teasdale v. Braithwaite*, 5 Ch. D. 630; "desire:" *Harding v. Glyn*, 1 Atk. 469; but see *In re Diggles*; *Gregory v. Edmondson*, 39 Ch. D. 253.

c. Even words of advice and recommendation, such as "advise:" *Parker v. Bolton*, 5 L. J. Ch. 98; "recommend:" *Tibbets v. Tibbets*, 19 Ves. 656; Jac. 317; *Horwood v. West*, 1 S. & St. 387; *Ford v. Fowler*, 3 B. 146; *Malim v. Keighley*, 2 Ves. Jun. 333, 529.

C. As to the interest taken by the donee in trust:

1. If there is a gift subject to trusts, the donee takes what-
 ever is not required for the performance of those trusts. *Dawson v. Clarke*, 15 Ves. 409; 18 Ves. 247; *King v. Denison*, 1 V. & B. 261; *Fenton v. Hawkins*, 9 W. R. 300; *Clarke v. Hilton*, L. R. 2 Eq. 810; *Croome v. Croome*, 59 L. T. 582; 61 L. T. 814.

Distinction between a gift subject to trusts and a gift upon trusts.

2. On the other hand, if the gift is upon trust, the donee takes the whole upon trust for the purposes declared; or for the heir at law or next of kin, if those purposes fail, or are not exhaustive or not declared. *Hobart v. Countess of Suffolk*, 2 Vern. 644; *Countess of Bristol v. Hungerford*, *ib.* 645; *Kellett v. Kellett*, 1 Ba. & Be. 533; 3 Dow, 248; *Watson v. Hayes*, 5 M. & Cr. 125; *Mullen v. Bowman*, 1 Coll. 197; *Andrews v. Andrews*, 1 Coll. 186; *Love v. Gaze*, 8 B. 472.

The question whether an absolute gift is made which is then burdened with trusts, or whether the donee takes only for the purpose of carrying out the trusts must be decided not merely upon the words of the gift, but from a consideration of the whole scope of the will. *Croome v. Croome*, 59 L. T. 582; 61 L. T. 814.

It may be noticed, that a devise of property, upon condition of making certain payments out of it, which are shown on the face of the instrument to exhaust the whole, is in effect a gift of the whole upon trust, and not subject to trusts. *A.-G. v. Wax Chandlers*, L. R. 6 H. L. 1; *A.-G. v. Merchant Taylors*, 6 Ch. 512; and see *Bird v. Harris*, 9 Eq. 204.

Gift upon condition may raise a trust.

Chap. XXXII.

In what cases
the donee
takes the
whole on
trust

3. Again, where the gift is to the donee indefinitely, without words expressly giving a beneficial interest, followed by precatory words, which raise a trust in favour of a particular class, the donee takes the whole in trust; as where the gift was to the testator's wife, under the firm conviction that she would dispose of and manage the same for the benefit of her children. *Barnes v. Grant*, 2 Jur. N. S. 1127; 26 L. J. Ch. 92; *Talbot v. O'Sullivan*, 6 L. R. Ir. 302; see *In re Rae's Estate*, 1 L. R. Ir. 174.

So a gift, without words of benefit superadded, for some particular purpose, whether declared or not, raises a trust as to the whole. *Corporation of Gloucester v. Wood*, 3 Ha. 131; 1 H. L. 272; *Aston v. Wood*, 6 Eq. 419.

Where the gift is in trust, the fact that the donee is described as wife or relation of the testator, or that a legacy is given to the heir will not entitle such donee to any beneficial interest. *Wych v. Packington*, 3 B. P. C. 44; *Wills v. Wills*, 1 Dr. & War. 439; *Starkey v. Brooks*, 1 P. W. 390.

Where a precatory trust is created in favour of a class, the donee may limit the shares of female members of the class to their separate use. *Willis v. Keymer*, 7 Ch. D. 181.

Cases where
the donee in
trust is in-
tended to
take some
interest.

4. If words of benefit are superadded, if, for instance, the gift is to A. for his own use and benefit, or absolutely, followed by words which raise a trust, the donee takes beneficially, subject to those trusts. *Wood v. Cox*, 5 M. & Cr. 684; *Shelley v. Shelley*, 6 Eq. 540; *Irvine v. Sullivan*, 8 Eq. 673.

But the case is different if such words as "for her sole use and benefit" can be shown to be inserted merely for the purpose of excluding a husband from the trust, as in *Stubbs v. Sargon*, 2 Kee. 255; 3 M. & Cr. 507, where the gift was to A. for her sole use and benefit, independent of her husband, for an express purpose. See *In re Haly's Trusts*, 23 L. R. Ir. 130.

5. So though the gift may be upon trust, it may appear that the donee is intended to take some beneficial interest by the fact that the testator calls her his heiress, or expressly excludes his heir from any benefit. *Rogers v. Rogers*, 3 P. W. 193; *Hughes v. Evans*, 13 Sim. 496; see *Williams v. Roberts*, 27 L. J. Ch. 177; 4 Jur. N. S. 18.

6. Again, the trust may not arise till the death of the donee upon trust, in which case he will take beneficially during his life.

Chap. XXXII.

Cases where the trust does not arise till the death of the donee.

a. Where there are words of indefinite gift followed by a recommendation or entreaty that the donee will at his decease give the property to a certain class, this raises a trust subject to his life interest. *Pierson v. Garrett*, 2 B. C. C. 38, 226; *Malim v. Keighley*, 2 Ves. Jun. 333, 529; *Cholmondeley v. Cholmondeley*, 14 Sim. 590; *Prevost v. Clarke*, 2 Mad. 458. See *In re Hamilton*, (1895) 1 Ch. 373.

The same construction was adopted, where there was an intention that the donee was not to dispose of the capital in her lifetime, followed by a recommendation to give the property in a certain way. See *Horwood v. West*, 1 S. & St. 387.

b. So, too, where the gift is to A. *for his own sole use and benefit* with an expression of desire or confidence that he will dispose of it among a certain class during his life and at his decease, the donee takes a life interest with a power of appointment by deed or will. *Harding v. Glyn*, 1 Atk. 469; *Evans v. Evans*, 12 W. R. 508; *Curnick v. Tucker*, 17 Eq. 320; *Fordham v. Speight*, 23 W. R. 782; *Le Marchant v. Le Marchant*, 18 Eq. 414; see, however, *In re Hutchinson & Tenant*, 8 Ch. D. 540.

c. And even where there was a gift to A. *to and for his sole use and benefit*, subsequent words, expressive of confidence that the donee would apply the same for her children *thereafter*, were held to give an interest for life with a power of appointment. *Gully v. Cregoe*, 24 B. 185.

And even in the absence of anything to show that the donee was intended to take a life interest, the same construction has been adopted. *Ware v. Mallard*, 21 L. J. Ch. 355; 16 Jur. 492; *Shovelton v. Shovelton*, 32 B. 143.

d. Where a power is given to a person to dispose of property for herself and her children, she does not take an absolute interest. *Crockett v. Crockett*, 2 Ph. 553; see *In re McVickers' Contract*, 25 L. R. Ir. 307; *In re Byrne's Estate*, 29 L. R. Ir. 250.

Cases where the donee in trust is herself one of the objects of the trust.

Nor will the legatee take absolutely where property is given to a legatee on trust for herself and her children; *Costabadie v. Costabadie*, 6 Ha. 410; *Godfrey v. Godfrey*, 11 W. R. 554; or

Chap. XXXII.

to be applied for herself and her children : *Bibby v. Thompson*, 32 B. 646 ; or to be appropriated by her to and amongst her children in such shares as she shall think proper : *In re Haly's Trusts*, 23 L. R. Ir. 130 ; or for her use and benefit, and for the maintenance and education of any children : *In re Booth ; Booth v. Booth*, (1894) 2 Ch. 282 ; or to be used for the benefit of herself and her children, at the discretion of the donee : *Hart v. Tribe*, 32 B. 279 ; 1 D. J. & S. 418 ; *Godfrey v. Godfrey*, 11 W. R. 554 ; *Newill v. Newill*, 7 Ch. 253 ; *Armstrong v. Armstrong*, 7 Eq. 518 ; see *Scott v. Key*, 13 W. R. 1030.

And even a life interest given to the testator's wife for the benefit of herself and her children is divisible equally among them. *Jubber v. Jubber*, 9 Sim. 503 ; see *Taylor v. Bacon*, 8 Sim. 100.

If, however, the gift is to A. with large powers of disposition or words of benefit added, the fact, that the gift is expressed to be for the benefit of herself and her children, will not raise a trust. *Lambe v. Eames*, 10 Eq. 267 ; 6 Ch. 597 ; *M'Alinden v. M'Alinden*, 1 R. 11 Eq. 219 ; *In re Hutchinson & Tenant*, 8 Ch. D. 540 ; *In re Adams*, 24 Ch. D. 199 ; 27 Ch. D. 394. See *Webb v. Wools*, 2 Sim. N. S. 267 ; *In re Booth ; Booth v. Booth*, (1894) 2 Ch. 282.

Distinction
between trust
and motive.

And where there is an absolute gift to A., a subsequent declaration that the benefit of A. and her children was the motive of the gift will raise no trust. *Thorp v. Owen*, 2 Ha. 607. See *Mackett v. Mackett*, 14 Eq. 49 ; *Briggs v. Sharp*, 20 Eq. 317.

Similarly a gift to enable a person to do something creates no trust. *Benson v. Whittam*, 5 Sim. 22 ; *Ryan v. Keogh*, 1 R. 4 Eq. 357 ; *Farr v. Hennis*, 44 L. T. 202. See *Biddles v. Biddles*, 16 Sim. 1 ; *quære*, whether *Byne v. Blackburn*, 26 B. 41, can stand on this ground.

Gifts to the
parent to be
applied for
the main-
tenance of his
children.

Where the interest upon legacies given to children is directed to be paid to their parents, and applied by them for their maintenance, the parents take subject to no account. *Hammond v. Neame*, 1 Sw. 35 ; *Berkeley v. Swinburne*, 6 Sim. 613 ; *Hadow v. Hadow*, 9 Sim. 438 ; *Browne v. Paull*, 1 Sim. N. S. 92.

In the same way a gift to the parent for the benefit or

maintenance of himself and his children may be safely paid to the parent. *Cooper v. Thornton*, 3 B. C. C. 96, 186; *Robinson v. Tickell*, 8 Ves. 142; *Re Robertson's Trust*, 6 W. R. 405. Chap. XXXII

VI. LEGACIES GIVEN TO BENEFIT A LEGATEE IN A PARTICULAR WAY.

1. A legacy given to a person for a particular purpose for the benefit of the legatee, as to bind him apprentice (*a*); to purchase a house (*b*); to establish a business (*c*); to purchase a commission (*d*); to pay off a mortgage (*e*); to carry on mines which the testator sells (*f*), is good though the purpose fails or becomes incapable of execution. *Barlow v. Grant*, 1 Vern. 255; *Nevill v. Nevill*, 2 Vern. 431; *Barton v. Cooke*, 5 Ves. 462 (*a*); *Knox v. Hotham*, 15 Sim. 82 (*b*); *Gough v. Bult*, 16 Sim. 45 (*c*); *Leche v. Lord Kilmorey*, T. & R. 207; *Cope v. Wilmot*, 1 Coll. 396; *Palmer v. Flower*, 13 Eq. 250 (*d*); *Lockhart v. Hardy*, 9 B. 379; *Adams v. Lopdell*, 25 L. R. Ir. 311 (*e*); *Parsons v. Coke*, 6 W. R. 715 (*f*).

Legacy to a legatee to be applied in a particular way for the benefit of the legatee.

The legacy will not be cut down to the amount actually required for the named purpose, unless the surplus, after satisfying that purpose, is expressly given over. *In re Lee's Trusts*, 1 R. 10 Eq. 157.

2. If the purpose for which the money is given is not merely the benefit of the legatee, but also the gratification of some wish of the testator, the question is, which is the primary object. *Re Skinner's Trust*, 1 J. & H. 102.

Distinction where the purpose is not merely the benefit of the legatee.

3. A gift expressed to be given from a certain motive, as, for instance, in discharge of a liability which does not exist, has in some cases been held to take effect. *Whitfield v. Clemment*, 1 Mer. 402; *Re Dyke*; *Dyke v. Dyke*, 44 L. T. 568. See 5 Ch. D. 778.

Gift to pay a non-existing debt.

VII. DISCRETIONARY TRUSTS.

1. A gift to trustees upon trust to dispose of the same as they think fit is too uncertain to be carried out by the Court, and is therefore void. *Fowler v. Garlike*, 1 R. & M. 232; *Ellis v.*

Discretion if too wide is void.

Chap. XXXII. *Selby*, 1 M. & Cr. 294; *Yeap Cheah Neo v. Ong Cheng Neo*, L. R. 6, P. C. 381; *Fenton v. Nevin*, 31 L. R. Ir. 478; see *Gibbs v. Rumsey*, 2 V. & B. 294.

Wide discretion given for benefit of an individual.

2. If a discretion is given to trustees to apply a fund for the benefit of an individual, and the mode of application is so wide as to lead to the inference that the primary object was to benefit the individual, he may be entitled to the fund, though the trustees do not exercise their discretion, or the individual to be benefited dies before they can do so. This may be the case, even if there is a gift over of so much as is not applied. *Gough v. Bult*, 16 Sim. 45; *Gude v. Worthington*, 3 De G. & S. 389; *In re Johnston*; *Mills v. Johnston*, (1894) 3 Ch. 204.

Discretion equivalent to power of advancement.

3. In some cases upon informal wills a power given to trustees to apply a sum for a legatee in a particular way has been held equivalent to a power of advancement, under which a legatee cannot claim anything not wanted for the purpose. *Lewis v. Lewis*, 1 Cox, 162; *Robinson v. Cleator*, 15 Ves. 526; *Cowper v. Mantell*, 22 B. 231; *In re Ward's Trusts*, 7 Ch. 726.

Intention to secure the personal benefit of a legatee.

4. Testators sometimes desire that a fund shall be applied only for the personal benefit of the legatee, so that it cannot be alienated by him or taken by his creditors. This object can be attained by means of a discretionary trust. If the trust is properly penned the legatee will be entitled only to so much as the trustees in their discretion think fit to apply for the purpose mentioned by the testator. If the trustees refuse to exercise their discretion, or do not exercise it fairly, the Court will inquire how much ought to be applied.

Thus a trust to apply the whole or any part of the income or capital of a fund for the maintenance of A. does not entitle him to more than is required for the purpose, and if the fund is reversionary, and A. dies before it falls into possession, his legal personal representatives are not entitled to anything. *In re Sanderson's Trust*, 3 K. & J. 497; *Re Stanger*; *Moorsom v. Tate*, 64 L. T. 693; 60 L. J. Ch. 326; 39 W. R. 455.

Protected life interests.

5. Questions of a similar kind arise upon protected life interests, where income payable to a tenant for life is given to

trustees upon a discretionary trust in the event of alienation by, or bankruptcy of the tenant for life. Chap. XXXII.

(a) If there is a trust to apply the income of property for the maintenance and support of one person, and the trustees have only a discretion as to the mode of application but cannot deprive the beneficiary of any part of the income, the income passes to his alienee or trustee in bankruptcy. *Green v. Spicer*, 1 R. & M. 395; *Youngehusband v. Gisborne*, 1 Coll. 400. Income to be applied for benefit of one object.

(b) Where under a similar trust, the trustees have a discretion to accumulate the whole or part of the income for the benefit of persons other than the original beneficiary, the income does not pass to his alienee or trustee in bankruptcy. *Snowdon v. Dales*, 6 Sim. 524; *Twopeny v. Peyton*, 10 Sim. 487; *Re Bullock*; *Good v. Lickorish*, 60 L. J. Ch. 341; 64 L. T. 736; 39 W. R. 472. Discretion to apply income for one or more persons.

But in such a case if the trustees pay or deliver money or goods to the beneficiary or appropriate money or goods to be paid or delivered to him, the money or goods pass to his alienee. *In re Coleman*; *Henry v. Strong*, 39 Ch. D. 443; *Re Neil*; *Hemming v. Neil*, 62 L. T. 649; see *In re Ashby*; *Ex parte Wreford*, (1892) 1 Q. B. 872.

(c) Where there is a trust for the benefit of a class, no member of which can be excluded from the benefits of the trust, so much of the income as is properly applicable for the benefit of any member goes to his alienee. Thus, where there is a trust for the maintenance and support of A., his wife and children, and A. alienates his interest, either before the trust arises or during its continuance, A.'s alienee will be entitled to so much of the income as is not required for the maintenance and support of A.'s wife and children. *Page v. Way*, 3 B. 20; *Kearsley v. Woodcock*, 3 Ha. 185; *Wallace v. Anderson*, 16 B 533. *Godden v. Crowhurst* (10 Sim. 642) went too far in giving nothing to the assignee in bankruptcy; *Rippon v. Norton* (2 B. 63) is wrong; see *In re Coleman*, 39 Ch. D. 443, p. 448. Income to be applied for benefit of a class.

(d) But where a trust for the benefit of a class is exclusive, so that the trustees are not bound to employ any part of the income for the benefit of any one member, so much only of Power of selection among members of a class.

Chap. XXXII. the income goes to the alienee of a member as the trustees pay or appropriate for payment to him. *In re Coleman, supra.* A trust for the maintenance of A., his wife and children, or any of them, is an exclusive trust within this rule. *Lord v. Bunn*, 2 Y. & C. C. 98; *Holmes v. Penney*, 3 K. & J. 90; *Re Neil*; *Hemming v. Neil*, 62 L. T. 649.

Duration of
discretion.

6. Where trustees have a discretionary power enabling them to defeat a previous vested gift, the discretion may be exercised after the alienation or bankruptcy of the beneficiary, although, if it is not exercised, an absolute interest in the property would pass to the alienee. *Coe's Trust*, 4 K. & J. 199; *Chambers v. Smith*, 3 App. C. 795.

CHAPTER XXXIII.

GIFTS OF ANNUITIES.

I. CHARACTERISTICS OF ANNUITIES.

AN annuity charged upon lands devised in fee is a legal rent-charge, even though it may be given to a person, his executors and administrators. *Ramsay v. Thorngate*, 16 Sim. 575; see *Martin v. Haynes*, 29 L. R. Ir. 416.

Chap.
XXXIII.
Annuity and
rent-charge
distinguished.

A gift of a rent-charge without more charges all the testator's lands. *Ex parte McDonall*, 5 Jur. N. S. 553.

In such cases the personalty is not liable. *Patching v. Barnett*, 51 L. J. Ch. 74; *Buckley v. Buckley*, 19 L. R. Ir. 544.

And a right to distrain is attached to it by statute 4 Geo. II. c. 28, s. 5. *Buttery v. Robinson*, 3 Bing. 392; *Sollory v. Leaver*, 9 Eq. 22; *Kelsey v. Kelsey*, 17 Eq. 496.

Where property is given subject to an annuity, the annuitant is not entitled to have the property sold and secured as long as the annuity is properly paid. *Re Potter*; *Potter v. Potter*, 50 L. T. 8; *In re Parry*; *Scott v. Leak*, 42 Ch. D. 570.

Arrears of an annuity charged on the corpus of land and arrears of a simple rent-charge may be raised by mortgage or sale of the land. *Cupit v. Jackson*, 13 Pr. 371; *Graves v. Hicks*, 11 Sim. 536, 551; *White v. James*, 26 B. 191; *Scottish Widows' Fund v. Craig*, 20 Ch. D. 208; *In re Tucker*; *Tucker v. Tucker*, (1893) 2 Ch. 323; *Hambro v. Hambro*, (1894) 2 Ch. 564; *In re Owen*, 43 W. R. 55.

Raising
arrears by
sale or
mortgage.

In *Sollory v. Leaver* it was held, that an annuitant whose annuity had fallen into arrear, was not entitled to a receiver, on the ground that he had a sufficient remedy by distress. A receiver would, however, probably now be appointed in such a case under sect. 25 (8) of the Judicature Act, 1873.

Right to
receiver.

An annuitant whose annuity is charged upon freeholds and

Right to
administer.

Chap.
XXXIII

residue is entitled to have the estate administered in order to ascertain the residue. *Wollaston v. Wollaston*, 7 Ch. D. 58.

A rent-charge, though charged upon realty and personalty, will be looked upon as issuing out of the realty alone. *Butt's Case*, 7 Rep. 23a; Co. Litt. 147 a; *Richardson v. Nixon*, 7 Ir. Eq. 620; *Sollory v. Leaver*, 9 Eq. 22.

The rule in *Shelley's Case* applies to rent-charges.

The rule in *Shelley's Case* and the other technical rules of construction apply to the limitations of a rent-charge. *Drew v. Barry*, I. R. 7 Eq. 413; 8 *ib.* 260.

A rent-charge is entailable, but if an estate tail is created in a rent-charge, and no remainder in fee is limited, the tenant in tail cannot create more than a base fee. Co. Litt. 298 a, note 2; *Chaplin v. Chaplin*, 3 P. W. 229.

Annuity to A. and his heirs.

An annuity, given out of personal assets, if given with words of inheritance, will devolve like real estate.

Annuities are not within the *Statute de Donis*.

Such an annuity, however, not being within the *Statute de Donis*, cannot be entailed. A devise, therefore, of a personal annuity to A. and the heirs of his body, gives A. a fee simple conditional. *Earl of Stafford v. Buckley*, 2 Ves. Sen. 170; *Turner v. Turner*, Amb. 776; 1 B. C. C. 316.

Annuity given to a man and his heirs remains personalty except for purposes of devolution.

But an annuity, though given with words of inheritance, is, for all other purposes than descent, personalty. *Earl of Stafford v. Buckley*, 2 Ves. Sen. 170; *Lady Holderness v. Lord Curmarthen*, 1 B. C. C. 377; *Aubin v. Daly*, 4 B. & Ald. 59; *Radburn v. Jervis*, 3 B. 450.

And an annuity charged upon real and personal estate, but given without words of limitation appropriate to realty, is personal estate. *Taylor v. Martindale*, 12 Sim. 158; *Parsons v. Parsons*, 8 Eq. 260; *Joynt v. Richards*, 11 L. R. Ir. 278; see *Martin v. Haynes*, 29 L. R. Ir. 416.

Direction to lay out sum in purchase of annuity.

A direction to lay out a specified sum in the purchase of an annuity for the life of A. vests that sum in the annuitant, whether the annuity is in possession or reversion. *Yates v. Compton*, 2 P. W. 308; *Barnes v. Rowley*, 3 Ves. 305; *Bayley v. Bishop*, 9 Ves. 6; *Palmer v. Craufurd*, 3 Sw. 482; see *Smith v. King*, 1 Russ. 363.

Direction to purchase annuity of

So if there is a direction to purchase a Government annuity of a given amount, the annuitant is entitled to the purchase-

money, though he may die before the time when the annuity was to be purchased. *Dawson v. Hearn*, 1 R. & M. 606; *Ford v. Batley*, 17 B. 303; see *In re Mabbett*; *Pitman v. Holborrow*, (1891) 1 Ch. 707.

Chap.
XXXXIII
certain
amount.

Upon the same principle a discretionary trust to purchase an annuity out of a fund, authorises advances to the legatee from time to time out of the capital of the fund. *Messeena v. Carr*, 9 Eq. 260.

A direction that the annuitant shall not be allowed to accept the value of the annuity in lieu thereof has been held ineffectual. *Stokes v. Cheek*, 28 B. 620.

Annuitant
not to have
value of his
annuity.

A discretion vested in trustees to apply the annuity for the benefit of the annuitant in the event of her incapacity will not alter the rule. *Re Browne's Will*, 27 B. 324.

Discretionary
trust.

And a restraint upon anticipation will not deprive the annuitant of the right to the purchase-money, except in the case of a married woman. *Woodmeston v. Walker*, 2 R. & M. 197.

Restraint
upon antici-
pation.

Where a fund was bequeathed to purchase an annuity in the name of an annuitant, a declaration that the annuity should cease upon alienation was held not to take the case out of the rule. *Hunt Foulston v. Furber*, 3 Ch. D. 285.

Cesser upon
alienation.

Where a fund is directed to be laid out by trustees in the purchase of an annuity for the life of A., for his support and maintenance, with a gift over if he alienates it or becomes bankrupt, the cases are directly conflicting upon the question, whether the representatives of the annuitant are entitled to have the fund paid over, if the annuitant dies before the time when the annuity was to be purchased, without having alienated the annuity or become bankrupt.

Gift over
upon bank-
ruptcy or
alienation.

In *Day v. Day*, 1 Dr. 569, the fund was directed to be paid to the representatives of the annuitant, but this decision was not followed in *Power v. Hayne*, 8 Eq. 252; or in *In re Draper*, 57 L. J. Ch. 942; 58 L. T. 942; 36 W. R. 783; see *Hatton v. May*, 3 Ch. D. 148.

Though the gift over upon bankruptcy or alienation might prevent the annuitant himself from calling for a transfer of the fund, it would seem that his representatives ought to be entitled

**Chap.
XXXIII.**

Annuitant is not entitled to the value of his annuity.

to the fund if the gift over does not take effect. See *Pearson v. Dolman*, 3 Eq. 315.

In the case of a gift of an annuity with a direction to set apart a fund to secure it, it is clear that the annuitant is not entitled to have the annuity valued and the value paid to him. *Wright v. Callender*, 2 D. M. & G. 652; *Miner v. Baldwin*, 1 Sm. & G. 522.

Deficient estate under administration.

If, however, the testator's estate is being administered by the Court and proves insufficient to pay the legacies and annuities given, so that an abatement is necessary, a value will be put upon the annuities as from the testator's death, and the annuitant or his representatives will be entitled to the valued amount after abatement. *Wroughton v. Colquhoun*, 1 De G. & S. 357; *Carr v. Ingleby*, *ib.* 362; *Long v. Hughes*, *ib.* 364.

This principle applies only where the estate is being administered. *In re Nicholson's Estate*, 1 R. 11 Eq. 177.

It does not apply to annuities determinable on marriage or bankruptcy. *Carr v. Ingleby*, *supra*; *Gratrix v. Chambers*, 2 Giff. 321.

If the annuity is charged upon corpus, the tenant for life of the corpus is not entitled to have the annuity valued and the amount paid out of corpus; but sufficient portions of the corpus must be sold from time to time to satisfy the annuity. *In re Grant*; *Walker v. Martineau*, 31 W. R. 703.

II. THE DURATION OF GIFTS OF ANNUITIES AND ANNUAL SUMS.

1. Annuities whether for life or perpetual :

Annuity created *de novo* is for life.

a. When an annuity is given to a person without more, the question arises, whether it was meant to be for life only, or perpetual; and this point, in the case of annuities created *de novo*, is unaffected by sect. 28 of the Wills Act. *Nicholls v. Hawkes*, 10 Ha. 342.

In the case of a deed, it has been decided, that a grant of an annuity given without words of limitation and charged upon freeholds, gives a life interest. The same rule applies if the

annuity is charged on freeholds and chattels real. *Butt's Case*, 7 Rep. 23 a; *In re Gillman's Estate*, I. R. 10 Eq. 92.

Chap.
XXXIII

Whether a grant of an annuity without words of limitation charged upon a chattel interest would endure beyond the life of the annuitant, if he dies during the term, is doubtful. Cases *supra*.

In the case of wills the gift of an annuity or annual sum to A. or A. for life and then to B., or to several persons successively for life and then to their children or to a person or his descendants, gives the beneficiaries in each case interests for their lives only. *Blewitt v. Roberts*, 10 Sim. 491; Cr. & Ph. 274; *Yates v. Maden*, 3 Mac. & G. 532; *Lett v. Randall*, 2 D. F. & J. 388; *Blight v. Hartnoll*, 19 Ch. D. 294; *In re Morgan*; *Morgan v. Morgan*, (1893) 3 Ch. 222. *Bent v. Cullen*, 6 Ch. 235; *Evans v. Walker*, 3 Ch. D. 211, must be considered overruled.

Rule as to
annuity given
by will.

Thus the fact that the annuity is charged upon freehold property, or even that it exhausts the whole of the rents and profits of the freehold property, and that the testator shews upon the face of his will that he is aware of this, will not make the annuity perpetual. *Mansergh v. Campbell*, 3 De G. & J. 232; *Barden v. Meagher*, I. R. 1 Eq. 246; *Sullivan v. Galbraith*, I. R. 4 Eq. 582; *Whitten v. Hanlon*, 16 L. R. Ir. 298; *Blight v. Hartnoll*, 19 Ch. D. 294.

Charge upon
rents of free-
holds.

Similarly the fact that the annuity is charged upon a fund or given out of the income of a fund or that a fund is given upon trust to pay the annuity does not make the annuity perpetual. *Wilson v. Maddison*, 2 Y. & C. C. 372; *In re Forster's Estate*, 23 L. R. Ir. 269; *In re Morgan*; *Morgan v. Morgan*, (1893) 3 Ch. 222.

Charge upon
income of a
fund.

b. But if the annuity is given in such a way as to amount to a gift of the income of a particular fund without limit of time, or as a gift of so much capital as will produce the annuity, or if the whole estate is distributed in the shape of annual sums, the annuity or annual sums will be perpetual. *Rawlings v. Jennings*, 13 Ves. 39; *Stokes v. Heron*, 12 Cl. & F. 161; *Kerr v. Middlesex Hospital*, 2 D. M. & G. 576; *Hill v. Potts*, 8 Jur. N. S. 555; *Potter v. Baker*, 13 B. 273; 15 B. 489; *Hicks v.*

When annuity
is perpetual.

**Chap.
XXXIII.**

**Charge upon
leaseholds.**

Ross, 14 Eq. 141; *Engelhardt v. Engelhardt*, 26 W. R. 853; see *Wakeham v. Merrick*, 37 L. J. Ch. 45.

And if the annuity is charged upon income which itself continues only for a limited time, for instance, upon the rents of a leasehold property, slight indications of intention are sufficient to show that it was to last during the currency of the lease. *Courtenay v. Callagher*, 5 Ir. Ch. 154, 356.

**Direction
to buy
annuity.**

A direction to invest a sum in Government securities sufficient to produce a certain annual sum for a beneficiary gives only a life annuity. *Re Grove's Trusts*, 1 Giff. 74; *Re Taber*; *Arnold v. Kayess*, 46 L. T. 805; 30 W. R. 883; 51 L. J. Ch. 721; see *Banks v. Braithwaite*, 11 W. R. 398; 32 L. J. Ch. 35, 198.

It has been said that a simple direction to buy an annuity is equivalent to a direction to purchase a perpetual annuity. *Ross v. Borer*, 2 J. & H. 469; but the decision is contrary to the principles which are now well settled.

**Direction for
cessor or sale
at a certain
time.**

If the annuity is directed to cease if the legatee dies without issue, or is directed not to be sold till after the death of the legatee, there is a strong argument that it was meant to be perpetual. *Hedges v. Harpur*, 3 De G. & J. 129; *Pawson v. Pawson*, 19 B. 146.

**Powers of
appointing
the annuity
in fee.**

Or again, if the legatee has a power of appointing the annuity in words that would authorise the appointment of a perpetual annuity, or the annuity is given over in certain events in fee, the same argument arises. *Wright v. Wright*, 12 Ir. Ch. 401; *Robinson v. Hunt*, 4 B. 450.

**Limitations
inconsistent
with a mere
life interest.**

And if the annuity, being given to several persons as tenants in common, is given over in its entirety at a period when, if it were only for the life of the legatees, it might have partially determined, it will be perpetual, as it would be absurd to suppose that it is to cease upon the death of a prior annuitant and to revive again in certain events. *Mansergh v. Campbell*, 3 De G. & J. 237; *Barden v. Meagher*, 1 R. 1 Eq. 246.

2. Annuities given for a period and for an object :

**Annuity
given for
fixed period
for mainte-
nance does**

An annuity given to a person for a fixed period for maintenance is not determined by the attainment of majority, or by death before that period. *Badham v. Mee*, 1 R. & M. 631; *Longmore*

v. Elcum, 2 Y. & C. C. 363; *Lewes v. Lewes*, 16 Sim. 266; *Attwood v. Alford*, L. R. 2 Eq. 479; *In re Ord*; *Dickinson v. Dickinson*, 9 Ch. D. 667; 12 Ch. D. 22; see *In re Hudson*; *Hudson v. Hudson*, 20 Ch. D. 406.

Chap.
XXXIII.
not determine
with minority.

This, however, does not apply where the duration of the annuity is merely the duration of the legal estate; if, for instance, the annuity is given to trustees for their lives, and the life of the longest liver of them, for the support of A. *Ryan v. Keogh*, 1. R. 4 Eq. 357.

The gift of an annual sum for maintenance and education is not to be limited to minority, but creates a life interest. *Soames v. Martin*, 10 Sim. 237; *Wilkins v. Jodrell*, 13 Ch. D. 564; see *Frewen v. Hamilton*, 47 L. J. Ch. 391; *In re Booth*; *Booth v. Booth*, (1894) 2 Ch. 282; see p. 385, *ante*.

Annuity for
maintenance
and educa-
tion.

In *Gardner v. Barber*, 18 Jur. 508, an annuity for maintenance and education was limited to minority. See *Foley v. Parry*, 2 M. & K. 138.

A gift of an annuity to a trustee, so long as he should continue to execute the office of trustee under the will, or for his trouble, ceases with the active trusts, not necessarily with a judgment for administration. *Baker v. Martin*, 8 Sim. 25; *Hull v. Christian*, 17 Eq. 546; *M'Dermot v. O'Connor*, 1. R. 10 Eq. 352; *Clay v. Coles*, W. N. 1880, 145; *Henrion v. Bonham*, Dru. t. Sug. 476; see *In re Muffett*; *Jones v. Mason*, 56 L. J. Ch. 600; 56 L. T. 685.

Annuity to
trustee for his
trouble.

It is clear that a gift of rents and profits to a parent during the minority of a child, where no benefit is intended for the child, will go to the representatives of the parent if he dies during the minority. *Smith v. Havers*, Cro. Eliz. 252; *Laxton v. Eedle*, 19 B. 321.

Gift to a
person during
the minority
of an infant

On the other hand, if the child dies during his minority, the parent will, nevertheless, be entitled to the rents and profits till the time when the child, if living, would have attained twenty-one, if the object of the gift is payment of debts. *Carter v. Church*, 1 Ch. Ca. 113; *Boraston's Case*, 3 Rep. 19 a.

And it would seem that the construction would be the same, if the object of the term is the benefit of the person to whom

Chap.
XXXIII.

the rents and profits are given during the minority. *Coates v. Needham*, 2 Vern. 65. See 1 Jarm. 544.

On the other hand, if the term is created for the benefit of the child, or if the object of it is merely to postpone the interest of the child till he should have performed some condition, which could not be performed after his death, the term will determine with his life. See *Manfield v. Dugard*, 1 Eq. Abr. 194, pl. 4, where the report is very unsatisfactory; *Lomax v. Holmeden*, 3 P. W. 176; and see *Castle v. Eate*, 7 B. 296; *Goodright d. Revell v. Parker*, 1 M. & S. 692.

III. ANNUITIES CHARGED ON CORPUS OR INCOME.

Whether.
annuities are
payable out
of income
or corpus.
Express
charge on

It is often a question of some difficulty whether an annuity is payable out of the corpus or only out of the income of a fund set aside for its payment.

1. If the annuity is plainly charged upon the corpus, the corpus is of course liable to make good arrears. *Picard v. Mitchell*, 14 B. 103; *Howarth v. Rothwell*, 30 B. 516; *Stamper v. Pickering*, 9 Sim. 176; *Wroughton v. Colquhoun*, 1 De G. and S. 36, 357; *Hickman v. Upsall*, 2 Giff. 124; *Gordon v. Bowden*, 6 Mad. 342; *Swallow v. Swallow*, 1 B. 432, n.; *Torre v. Browne*, 5 H. L. 555; *Haynes v. Haynes*, 3 D. M. & G. 590; *Lazonby v. Rawson*, 4 D. M. & G. 556; *Upton v. Vanner*, 1 Dr. & Sm. 594; *Horton v. Hall*, 17 Eq. 437; *Pearson v. Helliwell*, 18 Eq. 411; *In re Tucker*; *Tucker v. Tucker*, (1893) 2 Ch. 323; *Re Webb*; *Leedham v. Patchett*, 63 L. T. 545.

Direction
to set apart
a fund
which is to
fall into
the residue.

2. And if there is a clear gift of an annuity, a direction to set a fund apart to secure it which is to fall into the residue upon the death of the annuitant, does not disentitle the annuitant to have arrears made up out of corpus, since the direction is merely a means to the end. The question is then merely between the annuitant and the residuary legatee. *Bright v. Larcher*, 3 De G. & J. 148; *Davies v. Wattier*, 1 S. & St. 463; *May v. Bennett*, 1 Russ. 370; *Miner v. Baldwin*, 1 Sm. & G. 522; *Wright v. Callender*, 2 D. M. & G. 652; *Croly v. Weld*, 3 D. M. & G. 993; *Ingleman v. Worthington*, 1 Jur. N. S. 1062; *Mills v. Drewitt*, 20 B. 632; *Perkins v. Cooke*, 2 J. & H. 393; *Anderson*

v. Anderson, 33 B. 223; *Magill v. Murphy*, 1 L. R. Ir. 196; *Carmichael v. Gee*, 5 App. C. 588; *Re Taylor*; *Illsley v. Randall*, 50 L. T. 717.

Chap.
XXXXIII.

It makes no difference that the fund if directed to fall into the residue after the death of the annuitant may go to persons other than the residuary legatees. *Wright v. Callender, supra*.

In these cases, the direction to set apart a fund in fact amounts to a charge upon the corpus.

3. But if there is a direction to set apart a sum of money in order to pay an annuity out of the dividend with a gift over, the annuitant is not entitled to come upon the corpus, and it is a simple case of tenant for life and remainder-man. *A.-G. v. Poulden*, 3 Ha. 555; *Baker v. Baker*, 6 H. L. 616; *Hindle v. Taylor*, 20 B. 109; *Miller v. Huddleston*, 17 Sim. 71; 3 Mac. & G. 513; *Tarbottom v. Earle*, 11 W. R. 686; *Michell v. Wilton*, 23 W. R. 789.

Direction to set apart a fund to pay an annuity out of the dividends with gift over.

4. When, however, the annuity is charged upon the income of the whole estate there is more difficulty. If the capital is given over "subject to" or "after payment" of the annuities the corpus is liable. *Phillips v. Gutteridge*, 11 W. R. 12; 8 Jur. N. S. 1196; 32 L. J. Ch. 1; 4 De G. & J. 531; *Stamper v. Pickering*, 9 Sim. 176; *Playfair v. Cooper*, 17 B. 187; *Ex parte Wilkinson*, 3 De G. & S. 633; *Perkins v. Cooke*, 2 J. & H. 393; *Re Tyndall*, 7 Ir. Ch. 181; *Percy v. Percy*, 35 B. 295; *Carter v. Salt*, 1 R. 1 Eq. 97; *Bell v. Bell*, 1 R. 6 Eq. 230; *Birch v. Sherratt*, 4 Eq. 58; 2 Ch. 644; *In re Mason*; *Mason v. Robinson*, 8 Ch. D. 411; *In re Pepper's Trusts*, 13 L. R. Ir. 108; *In re Moore's Estate*, 19 L. R. Ir. 365.

Annuity charged upon income of whole estate.

5. But if there is anything to show that the corpus is looked upon as entire after the annuitant's death; if, for instance, it is given over immediately upon the death of the annuitant, or the trust then comes to an end, or it is then directed to be sold, or if the corpus is devised in strict settlement, it is not liable to make good arrears. *Foster v. Smith*, 1 Ph. 629; *Addcott v. Addcott*, 29 B. 460; *Re Kelly*, 9 Ir. Ch. 103; *Forbes v. Richardson*, 11 Ha. 354; *Darbon v. Rickards*, 14 Sim. 537; *Earle v. Bellingham* (No. 1), 24 B. 445; *Sheppard v. Sheppard*, 32 B. 194; *Taylor v. Taylor*, 17 Eq. 324.

Corpus treated as remaining entire at the annuitant's death

Chap.
XXXIII.

Gift of
surplus
income of
each year.

And if it is clear that the annuity is to be paid only out of the income of each year, by a gift, for instance, of the surplus income of each year as it accrues to others, the corpus is *a fortiori* not liable. *Stelfox v. Sugden*, John. 234; *Darbon v. Rickards*, 14 Sim. 537; *Sheppard v. Sheppard*, 32 B. 194; see *Wormald v. Muzeen*, 50 L. J. Ch. 776; 29 W. R. 795; 17 Ch. D. 167; *In re Matthews' Estate*, 7 L. R. Ir. 269.

When an
annuity is a
continuing
charge on the
annual rents.

6. In some cases the further question arises whether, supposing the annuity not to be charged upon corpus, it is a continuing charge on the rents and profits, so that arrears will have to be made up out of surplus income during the annuitant's life, and even after his death, and if there is nothing to show that the annuity was to be confined to the income of each year, as in *Stelfox v. Sugden*, or that it was to determine immediately on the annuitant's death, as in *Foster v. Smith*, 1 Ph. 629; *Earle v. Bellingham*, 24 B. 445, arrears will be a continuing charge during the annuitant's life and after his death. *Forbes v. Richardson*, 11 Ha. 354; *Phillips v. Phillips*, 8 B. 193; *Taylor v. Taylor*, 17 Eq. 324; *Booth v. Coulton*, 5 Ch. 684; *Salvin v. Weston*, 14 W. R. 757.

Marshalling
in favour of
rent-charge.

7. Where an annuity is charged on land only, which is subject to a mortgage, and the mortgagee sells the land and applies the proceeds in payment of his debt, the annuitant is entitled to stand in the shoes of the mortgagee against the personal estate. *Buckley v. Buckley*, 19 L. R. Ir. 544.

CHAPTER XXXIV.

TENANT FOR LIFE AND REMAINDERMAN.

I. CREATION OF LIFE ESTATES.

1. IN wills before the Wills Act a devise to a person without words of limitation gave a life estate only, but now by section 28 of the Wills Act such a devise is to be construed to pass the fee simple or other the whole interest which the testator had power to dispose of by will, unless a contrary intention appears by the will.

Chap.
XXXIV.

Devise
without
words of
limitation.

If a life interest is devised to A., followed by a devise to his first and other sons successively for life, with remainder to the first and other sons of such first son for ever, the life interest to the first and other sons of A. is not enlarged. *Kershaw v. Kershaw*, 3 E. & B. 845; *Forsbrook v. Forsbrook*, 3 Ch. 93.

Successive
life estates
not enlarged.

And the same construction may be adopted where the interests of the sons of A. are not expressly stated to be for life.

Then under a devise to A. for life with remainder to his first and every other son successively, not expressly for life, and in default of such issue over, each son takes only for life. *Foster v. Lord Romney*, 11 East, 594; *Bevan v. White*, 7 Ir. Eq. 473; *Palmer v. Palmer*, 18 L. R. Ir. 192.

2. A gift without words of limitation may be cut down to a life interest if the same property is disposed of at the death of the first taker. *In re Russell*, 53 L. J. Ch. 400; rev. 52 L. T. 559; *In re Houghton*; *Houghton v. Houghton*, 53 L. J. Ch. 1018; see *In re Percy*; *Percy v. Percy*, 24 Ch. D. 616.

Effect of
gift at the
death of first
taker.

And words indicating that the property is to be enjoyed by some one else after the death of the first taker may have the same effect. *Gravenor v. Watkins*, L. R. 6 C. P. 500.

Similarly where the testator's whole property is given to a

Chap.
XXXIV.

Gift of what
remains.

person absolutely, followed by a gift of the residue at his decease, the first gift may be cut down to a life interest. *Sherratt v. Bentley*, 2 M. & K. 149; *Hare v. Westropp*, 9 W. R. 689; *Re Brook's Will*, 2 Dr. & Sm. 362; *In re Bagshaw's Trusts*, 24 W. R. 875; 25 W. R. 659; 46 L. J. Ch. 567.

A gift after the death of the first taker of what then remains may reduce the prior interest to a life interest. *Constable v. Bull*, 3 De G. & S. 411; *Re Adams' Trust*, 14 W. R. 18; *Bibbens v. Potter*, 10 Ch. D. 733.

And a gift of residue to the testator's widow for her absolute use and disposal, followed by a gift in case at her decease any part thereof should remain undisposed of, has been held to give a life interest with a power of disposition by act *inter vivos*, but not by will. *In re Pounder*; *Williams v. Pounder*, 56 L. J. Ch. 113; 56 L. T. 104.

Devise to A.
for his life
and that of
his heir.

A devise to A. for his life and the life of his heir gives him an estate during his own life and that of his heir. *In re Amos*; *Carrier v. Price*, (1891) 3 Ch. 159.

II. GIFTS TO SEVERAL FOR THEIR LIVES.

Devise to
A. and B.
for their lives.

1. A devise to A. and B. for their lives is equivalent to a devise to them and the survivor of them.

So a devise to A. during the life of B. and C. continues during the joint lives of B. and C., and the life of the survivor of them.

But a devise to A. for a term if B. and C. so long live determines by the death of B. or C. *Brudnell's Case*, 5 Rep. 9; *Day v. Day*, Kay, 703.

In the same way a gift of an annuity to two persons for their lives is a gift to them and to the survivor of them, though the annuitants may be husband and wife. *Moffat v. Burnie*, 18 B. 211; *Neighbour v. Thurlow*, 28 B. 33; *Alder v. Lawless*, 32 B. 72; see *Day v. Day*, Kay, 703.

And the same construction has been put upon a gift to two during their joint lives followed by a gift over after the death of both. *Townley v. Bolton*, 1 M. & K. 148; see *Smith v. Oakes*, 14 Sim. 122.

Gift of
annuity for

2. A direction to purchase an annuity for the lives of A. and B.

to be equally divided between them gives them an annuity only during the joint lives. *Grant v. Wimbolt*, 2 W. R. 151; 23 L. J. Ch. 282; *In re Drakeley's Estate*, 19 B. 395.

Chap.
XXXIV.
lives of A.
and B.

But a gift to A. and B. of the sum of £30 each yearly, so long as they shall live, gives each a separate annuity of £30. *Lill v. Lill*, 23 B. 446.

And a gift of income to three for their respective lives, and subject thereto for their respective children, is a gift of a third to each for his life. *Sutcliffe v. Howard*, 38 L. J. Ch. 472.

3. Under a gift of an annuity to A. and B. as tenants in common during their joint lives and the life of the survivor, if A. dies his legal personal representatives are entitled to half the annuity during the life of the survivor. *Jones v. Randall*, 1 J. & W. 100; *Eales v. Cardigan*, 9 Sim. 384; *Bryan v. Twigg*, 3 Eq. 433; *Bryan v. Twigg*, 3 Ch. 183; *Chatfield v. Berchtoldt*, 18 W. R. 387.

Gift of
income to
two as tenants
in common
for a definite
period.

If the annuity is to be paid to several as tenants in common but not limited for their lives, and the duration of the annuity is defined by a gift over at the death of the survivor, the same result follows, and the representatives of a deceased annuitant takes his share while the annuity lasts. *Bignold v. Giles*, 4 Dr. 343.

4. But even in cases where the duration of the annuity is clearly defined there may be words to show that the survivor was to take the whole. Thus, if the gift is to several as tenants in common "for their lives or the life of the survivor for their or her absolute use," or "for their lives and the life of the survivor during their and her natural life," the additional words show that the survivor was to take the whole. *Hatton v. Finch*, 4 B. 186; *Cranswick v. Pearson*, 31 B. 624; affd. 9 L. T. 275, and in *Doe d. Borwell v. Abey*, 1 M. & S. 428, the gift over "from and after their respective deceases and the decease of the survivor" indicated that the representatives of annuitants were not to take anything after their respective deaths.

Cases in
which the
survivor
takes the
whole income.

5. If the annuity is given to several for their lives as tenants in common with a gift over of the annuity as a whole after the

Duration
of annuity
inferred from
gift over.

Chap.
XXXIV.

death of the survivor, the effect may be to give the whole annuity to the survivor during his life, as the limitation for life shews that the representatives of a deceased annuitant were not intended to take after his death.

Thus, under a gift of an annuity to A. and B. to be equally divided between them for their lives with a gift over after the death of both, or after the death of the survivor, the survivor takes the whole for life. *Armstrong v. Eldridge*, 3 B. C. C. 215; *Tuckerman v. Jefferies*, 3 Bac. Ab. ed. Gw. 681; 11 Mod. 108; *McDermott v. Wallace*, 5 B. 142; *Draycott v. Wood*, 8 L. T. 304.

This construction has been applied to the case of a gift of the income of a fund to A. and B. during their lives in equal shares, followed by a gift after the death of A. and B. to their children, in cases where there was no gift to the children till after the death of the survivor of A. and B. *Armstrong v. Eldridge*, 3 B. C. C. 215; *Pearce v. Edmeades*, 3 Y. & C. Ex. 246; *Alt v. Gregory*, 8 D. M. & G. 221; *Begley v. Cook*, 3 Dr. 662; *Minton v. Minton*, 9 W. R. 586; see *Round v. Pickett*, 47 L. J. Ch. 631; *Kelsey v. Ellis*, 38 L. T. 471.

III. PROVISIONS DETERMINING LIFE INTERESTS.

Direction not
to alienate.

A direction that a life interest is not to be alienated, if there is no provision to determine or give over the life interest, is ineffectual. *Brandon v. Robinson*, 18 Ves. 429; *Graves v. Dolphin*, 1 Sim. 66; *Rochford v. Hackman*, 9 Ha. 475, 480.

Proviso for
cesser.

But a proviso for cesser of a life interest upon bankruptcy or alienation, whether followed by a gift over or not, is valid. *Dommatt v. Bedford*, 6 T. R. 684; *Joel v. Mills*, 3 K. & J. 458.

Gift over on
bankruptcy.

And a life interest may be given over upon bankruptcy or alienation. *Rochford v. Hackman*, 9 Ha. 475; *Brooke v. Pearson*, 5 Jur. N. S. 781; *Knight v. Browne*, 7 Jur. N. S. 894; 30 L. J. Ch. 649; *Hurst v. Hurst*, 21 Ch. D. 278.

The object of such gifts over is, as a rule, to protect the tenant for life against himself, and to make a provision for

him by means of a discretionary trust which cannot be attached by a trustee in bankruptcy. See p. 406.

Chap.
XXXIV.

A gift over upon the bankruptcy of the tenant for life does not determine a power vested in him of appointing the property to his children, unless there are directions inconsistent with the continuance of the power, such as a direction to distribute the property at once among the children in the event of bankruptcy. *Wickham v. Wing*, 2 H. & M. 436; *Haswell v. Haswell*, 28 B. 26; 2 D. F. & J. 456; see *Potts v. Britton*, 11 Eq. 433; *In re Stone's Estate*, 1 R. 3 Eq. 621.

IV. WASTE.

Various restrictions may be imposed on a life estate.

It may be with or without impeachment of waste, and in the case of a married woman it may be for her separate use with or without power of anticipation during the coverture. Separate use and restraint upon anticipation apply to absolute as well as to life interests, and will be found dealt with in the chapter on conditions.

A. CREATION OF ESTATES WITH AND WITHOUT IMPEACHMENT OF WASTE.

A tenant for life cannot commit waste, unless expressly made unimpeachable for waste.

A tenant for life without impeachment of waste, voluntary waste excepted, is only excused for permissive waste. *Garth v. Cotton*, 1 Ves. Sen. 524, 546; 1 Dick. 183.

Impeachment
of waste.

But the exception of voluntary waste may be so qualified as to entitle the tenant for life to cut timber. *Vincent v. Spicer*, 22 B. 380; see *Wickham v. Wickham*, 19 Ves. 419.

Tenant for life unimpeachable for waste may in effect be deprived of the right to cut timber if a large discretion to cut timber is vested in trustees. *Kekewich v. Marker*, 3 Mac. & G. 311.

Chap.
XXXIV.

Tenants in
dower and
by curtesy.
Tenant in
fee subject
to gift over.

Tenants in dower and by curtesy are impeachable for waste. *Ap Rice's Case*, 3 Leon, 121; Co. Litt. 53 a.

Tenant in fee subject to an executory devise over may commit legal but not equitable waste. *Turner v. Wright*, Jo. 742; 2 D. F. & J. 234.

He may be restrained from cutting timber by express words. *Blake v. Peters*, 1 D. J. & S. 345.

Tenant in
tail after
possibility of
issue extinct.

Tenant in tail after possibility of issue extinct is in the position of tenant for life punishable for waste. *Lewis Bowles' Case*, 11 Rep. 79 b.; *Williams v. Williams*, 15 Ves. 419; 12 East, 209.

Tenant in
tail by act of
parliament.

Tenant in tail restrained by statute from disentailing is punishable for legal waste, but will be restrained from equitable waste. *A.-G. v. Duke of Marlborough*, 3 Mad. 498.

B. RIGHTS AS REGARDS TIMBER, ETC.

1. *Tenant for Life without Impeachment of Waste.*

Legal and
equitable
waste.

Tenant for life without impeachment of waste may commit legal but not equitable waste.

Thus he may cut down the timber on the estate, not being ornamental timber, and it becomes his property from the moment of severance. *Wolf v. Hill*, 2 Sw. 149 n.; *Doran v. Wiltshire*, 3 Sw. 699; *Gordon v. Woodford*, 27 B. 603.

He may cut trees which have become timber though they have not attained maturity, or though cutting them will deprive saplings of shelter. *Smythe v. Smythe*, 2 Sw. 252; *Potts v. Potts*, 3 L. J. Ch. O. S. 176.

But though he is entitled to the timber when cut down, he is not entitled to it till then, and if he has a power of sale he cannot sell and appropriate the value of the timber. *Wolf v. Hill*, 2 Sw. 149 n.; *Doran v. Wiltshire*, 3 Sw. 699.

Windfalls.

Timber and the materials of houses blown down during the possession of a tenant for life without impeachment of waste belong to him. *Lewis Bowles' Case*, 11 Rep. 79 b.; *Tudor L. C. 27*; *Pyne v. Dor*, 1 T. R. 55; *Wolf v. Hill*, 2 Sw. 149 n.; *Williams v. Williams*, 15 Ves. 419; 12 East, 209.

But tenant for life without impeachment of waste may not cut young trees and saplings before they are fit for timber. *O'Brien v. O'Brien*, Amb. 106; *Strathmore v. Bowes*, 2 B. C. C. 88; *Chamberlayne v. Dummer*, 1 B. C. C. 166; 3 B. C. C. 548; see *Aston v. Aston*, 1 Ves. Sen. 264; *Potts v. Potts*, 3 L. J. Ch. O. S. 176.

Chap.
XXXIV.

Unripe
timber.

The Court will in all cases restrain wanton destruction, such as cutting down fruit trees, or pulling down a mansion house or buildings. *Vane v. Lord Barnard*, 2 Vern. 738; Pr. Ch. 454; Gilb. Eq. 127; *Anon.*, 2 Eq. Ab. 757 pl. 2; *Kaye v. Banks*, 2 Dick. 431; *Aston v. Aston*, 1 Ves. Sen. 264.

Wanton
destruction.

But if the tenant for life pulls down a mansion house, and rebuilds it with the same materials, there can be no account against him. *Morris v. Morris*, 3 De G. & J. 323.

By sect. 25 (3) of the Judicature Act, 1873, tenant for life without impeachment has no legal right to commit equitable waste.

Equitable
waste.

Equitable waste is cutting down ornamental timber.

Ornamental timber includes trees growing naturally which are, in fact, ornamental, and trees planted for ornament, whether in fact ornamental or not, even though planted by the tenant for life himself. *Packington's Case*, 3 Atk. 216; *Coffin v. Coffin*, Jac. 70; see *Ford v. Tynte*, 2 D. J. & S. 127.

What is
ornamental
timber.

Where a mansion house has been pulled down, and the estate devoted to game, the timber, though formerly ornamental, will not be protected. *Micklethwait v. Micklethwait*, 1 De G. & J. 504.

Effect of
pulling down
mansion
house.

But in such a case the ornamental timber may be protected if the estate is intended to be let on building leases. *Wellesley v. Wellesley*, 6 Sim. 497; *Morris v. Morris*, 15 Sim. 505.

And where the tenant for life restores a decayed mansion house, he may cut down ornamental timber about it. *Newdigate v. Newdigate*, 1 Sim. 131; 2 Cl. & F. 601; 8 Bli. N. S. 734.

A tenant for life unimpeachable for waste who cuts down ornamental timber which the Court would have directed to be cut if application had been made to it was held entitled to the proceeds. *Baker v. Sebright*, 13 Ch. D. 179.

Chap.
XXXIV.

2. *Tenant for Life Impeachable for Waste.*

Rights of
tenant for life
impeachable
for waste as
regards trees
not timber.

Tenant for life impeachable for waste has a general property in trees not timber; he may cut them down and take the proceeds, and if blown down by a storm or severed by a stranger they belong to him. *Countess of Cumberland's Case*, Moor. 812; *Channon v. Patch*, 5 B. & C. 897; *Berriman v. Peacock*, 8 Bing. 384; *Bateman v. Hotchkin*, 31 B. 486; *Pidgely v. Rawling*, 2 Coll. 275; *Earl Cowley v. Wellesley*, 35 B. 635; L. R. 1 Eq. 656; *Honywood v. Honynwood*, 18 Eq. 306, 307.

Timber for
repairs.

He may cut timber for repairs actually about to be done, but he may not sell the timber in order to spend the money in repairs, and if the timber proves unsuitable for the repairs, he may not sell it and take the proceeds. *Maleverer v. Spinke*, Dyer, 35 b.; *Gower v. Eyre*, G. Coop. 156; *Simmons v. Norton*, 7 Bing. 640.

But he may sell the timber cut in order to buy other timber in a more convenient situation. *Wither v. Dean and Chapter of Winchester*, 3 Mer. 421, 426; *Sowerby v. Fryer*, 8 Eq. 417.

Timber for
fences.

He may not cut timber to enclose lands allotted or exchanged under Inclosure Acts. *Lee v. Alston*, 1 B. C. C. 194.

Periodical
cuttings.

Tenant for life impeachable for waste is entitled to the periodical cuttings of coppices and plantations of timberlike trees which have never been allowed to grow into timber but have always been cut as underwood. *Bateman v. Hotchkin*, 31 B. 486; *Bagot v. Bagot*, 32 B. 509, 517.

Timber
estates.

In the case of an estate in a district in which it is the custom to cut timber periodically when grown in woods, so as to continue a succession of timber and to preserve the woods, the tenant for life is entitled to the proceeds of the periodical cuttings. *Dashwood v. Magniac*, (1891) 3 Ch. 306; see *Oxenden v. Compton*, 2 Ves. Jun. 69, p. 71.

Settlement
on trust for
sale.

Where an estate was settled upon trust for sale and to pay the income of the proceeds of sale to a tenant for life, and larch plantations on the estate were blown down by a storm, it was held that the proceeds must be invested, but the tenant for life was held entitled to have his income made up out of the invest-

ments to the sum he had received on an average of years. *In re Harrison's Trusts*; *Harrison v. Harrison*, 28 Ch. D. 220.

Chap.
XXXIV.

3. *Property in Timber Cut, etc.*

In the case of legal waste, timber wrongfully cut, whether by tenant for life or a stranger, or its proceeds vest in the first owner of a vested estate of inheritance, whether there are intermediate life estates unimpeachable for waste, or intermediate contingent remainders or not. *Whitfield v. Bewit*, 2 P. W. 240; *Lee v. Alston*, 3 B. C. C. 38, 1 Ves. Jun. 82; *Bewick v. Whitfield*, 3 P. W. 267; *Gent v. Harrison*, Joh. 517; *Dare v. Hopkins*, 2 Cox, 110; *Pigott v. Bullock*, 1 Ves. Jun. 478.

Property
in proceeds
of legal
waste.

The owner of the first estate of inheritance can immediately sue to recover the timber or its proceeds, and the Statute of Limitations runs against him from the date of the cutting. *Seagram v. Knight*, L. R. 2 Ch. 628; *Higginbotham v. Hawkins*, 7 Ch. 676.

Statute of
Limitations.

Timber blown down by a storm during the possession of a tenant for life impeachable for waste follows the same rule, that is to say, it belongs to the owner of the first vested estate of inheritance, and is not invested. *Uvedall v. Uvedall*, 2 Roll. Ab. 119; *Pigott v. Bullock*, 1 Ves. Jun. 484; *Lewis Bowles' Case*, 11 Rep. 79 b; Tudor, L. C. 27; *Whitfield v. Bewit*, 2 P. W. 240; *Bewick v. Whitfield*, 3 P. W. 267; *Duke of Newcastle v. Vane*, cited 2 P. W. 241.

Timber blown
down.

If the person having a vested estate of inheritance commits the waste, or if the tenant for life and remainderman in fee collude to commit waste, equity will interfere at the instance of an intermediate tenant for life, or of trustees to preserve contingent remainders, and will preserve the proceeds of the waste for the benefit of persons who become entitled under subsequent intermediate limitations. *Williams v. Duke of Bolton*, 1 Cox, 72; 3 P. W. 268 n.; *Powlett v. Duchess of Bolton*, 3 Ves. 374; *Garth v. Cotton*, 1 Ves. Sen. 524; 1 Dick. 183; *Perrot v. Perrot*, 3 Atk. 94; *Davies v. Leo*, 6 Ves. 784; *Birch-Wolfe v. Birch*, 9 Eq. 683.

Collusion
between
tenant for
life and re-
mainderman.

Chap.
XXXIV.

Proceeds of
equitable
waste.

In such a case, however, if as much is laid out upon the estate as is taken from it by waste, equity will not interfere. *Birch-Wolfe v. Birch*, 9 Eq. 683.

The law appears to be unsettled as to the property in the proceeds of equitable waste.

There is authority for saying that they follow the analogy of legal waste and vest in the owner of the first estate of inheritance in existence at the time when the waste is committed.

It would follow that a tenant for life in remainder cannot sue for an account of the proceeds, and it has been so held in *Rolt v. Lord Somerville*, 2 Eq. Ab. 759; *Ormond v. Kynnersley*, 7 L. J. Ch. O. S. 150; 8 *ib.* 67; 15 B. 10 n.

It would also follow that the statute runs against the remainderman from the time when the waste was committed. *Simpson v. Simpson*, 3 L. R. Ir. 308.

The better opinion, however, appears to be that the proceeds of equitable waste must be invested and treated as part of the estate. During the life of the tenant for life who committed the waste the proceeds must be invested and the income will be accumulated, but a subsequent tenant for life will take the income. This was done in *Lushington v. Boldero*, G. Coop. 216; 6 Mad. 149; 13 B. 418; 15 B. 1; see *Honywood v. Honynwood*, 18 Eq. 306.

The same view is also supported by the cases in which tenant for life in remainder has been held entitled to sue for an injunction to restrain equitable waste. *Perrot v. Perrot*, 3 Atk. 94 (apparently a case of legal waste); *Davies v. Leo*, 6 Ves. 784, 786; *Morris v. Morris*, 15 Sim. 505.

It is also supported by the decision of Lord Cottenham that the statute does not begin to run against the remainderman until his title accrues in possession. *Duke of Leeds v. Earl of Amherst*, 2 Ph. 117; see *Harcourt v. White*, 28 B. 303; *Birch-Wolfe v. Birch*, 9 Eq. 683.

Power under
Settled Land
Act to cut
timber.

Sect. 35 of the Settled Land Act, 1882, provides that where a tenant for life is impeachable for waste in respect of timber and there is timber ripe and fit for cutting, he may, with the consent of the trustees of the settlement or under an order of

the Court, cut the timber. Three-fourths of the proceeds are capital and the rest income.

Chap.
XXXIV.

In cases not within this section, where timber is cut by a trustee or by the Court because it is decaying or to make room for other trees, the proceeds are invested and the interest paid to the tenant for life. *Wickham v. Wickham*, G. Coop. 288; 19 Ves. 419; *Tooker v. Annesley*, 5 Sim. 235; *Waldo v. Waldo*, 7 Sim. 261; 12 Sim. 107; *Tollemache v. Tollemache*, 1 Ha. 456; *Ferrand v. Wilson*, 4 Ha. 381; *Lord Lovat v. Duchess of Leeds*, 2 Dr. & Sm. 75; *Earl Cowley v. Wellesley*, L. R. 1 Eq. 656; *Honywood v. Honrywood*, 18 Eq. 306.

Timber cut
by Court.

The capital will belong to the first tenant for life without impeachment of waste who comes into possession or to the first owner of an estate of inheritance.} *Gent v. Harrison*, Joh. 517; *Waldo v. Waldo*, 12 Sim. 107; *Phillips v. Barlow*, 14 Sim. 263; *Jodrell v. Jodrell*, 7 Eq. 461; *Lowndes v. Norton*, 6 Ch. D. 139.

C. RIGHTS AS REGARDS MINES.

Tenant for life impeachable for waste is entitled to the profits of mines and quarries opened by the testator, and he may even open a new pit if it is for the more profitable working of an old mine. Co. Lit. 54 b; *Spencer v. Scurr*, 31 B. 334; *Bagot v. Bagot*, 32 B. 509; *Earl Cowley v. Wellesley*, 35 B. 635; *Miller v. Miller*, 13 Eq. 263; see *Elias v. Snowdon Slate Quarries*, 4 App. C. 454. Mines.

He is also entitled to the profits of mines opened under powers conferred by the testator or agreed to be leased by him though the leases are not actually granted or the mines opened at the testator's death. *Daly v. Beckett*, 24 B. 114; *Earl Cowley v. Wellesley*, 35 B. 635; *In re Kemeys-Tynte*; *Kemeys-Tynte v. Kemeys-Tynte*, (1892) 2 Ch. 211.

He cannot work an abandoned mine. *Claverling v. Claverling*, 2 P. W. 388; *Viner v. Vaughan*, 2 B. 466.

The Settled Land Act, 1882, authorises the granting of mining leases by tenants for life, and provides (sect. 11) for the disposal of the rents.

Chap.
XXXIV.

Except in the cases above mentioned, a tenant for life impeachable for waste is not entitled to the profits of mines not opened till after the testator's death. *Campbell v. Wardlaw*, 8 App. C. 641.

D. PERMISSIVE WASTE.

Tenant for
life not liable
for permissive
waste.

1. A tenant for life, whether legal or equitable, is not liable for permissive waste. *Powys v. Blagrove*, 4 D. M. & G. 448; *Warren v. Rudall*, 1 J. & H. 1; *Baines v. Dowling*, 44 L. T. 809; *In re Hotchkys*; *Freke v. Calmady*, 32 Ch. D. 408; *Avis v. Newman*, 41 Ch. D. 532.

2. But if the will directs the tenant for life to repair, his estate is liable if proceedings are taken within six months after his executor has undertaken the administration of the tenant for life's estate. *Woodhouse v. Walker*, 5 Q. B. D. 404; *Re Williames*; *Andrew v. Williames*, 52 L. T. 41.

Amount
recoverable.

The amount recoverable is the cost of putting the property into proper repair, irrespective of the damage suffered. *Joyner v. Weeks*, (1891) 1 Q. B. 31.

Liability to
insure and
rebuild.

3. If an obligation is imposed on the tenant for life to repair, it seems he is also bound to insure and is liable to rebuild in case of fire. *In re Skingley*, 3 Mac. & G. 221; *Gregg v. Coates*, 23 B. 33; *Penfold v. Shillingford*, 25 W. R. 425.

He is not bound to pay a sum for which the testator was at his death liable for repairs. *Harris v. Poyner*, 1 Dr. 174; *Penfold v. Shillingford*, *supra*; see *Hickling v. Boyer*, 3 Mac. & G. 635.

But a direction to keep the property in good and tenantable repair makes the tenant for life liable for dilapidations for which the testator was responsible. *Re Bradbrook*, 56 L. T. 106.

Duty of
trustees to
repair.

4. Upon this subject it must be remembered that, though a tenant for life is not as an ordinary rule liable for repairs, yet where leasehold property is vested in trustees it may be their duty to perform the covenants in the leases, and if they do so the expenses must be fairly apportioned between capital and income. *In re Fowler*; *Fowler v. Odell*, 16 Ch. D. 723;

In re Hotchkys; *Freke v. Calmady*, 32 Ch. D. 408; *In re Courtier*; *Coles v. Courtier*, 34 Ch. D. 136; see *Debney v. Eckett*, 43 W. R. 54.

Chap.
XXXIV.

V. EMBLEMENTS.

Emblements are corn, roots, flax, hemp and other annual profits. Co. Lit. 55; *Latham v. Atwood*, Cro. Car. 515; *Evans v. Roberts*, 5 B. & C. 832; see *Graves v. Weld*, 5 B. & Ald. 120.

Emblements defined.

The executor of a tenant for life whose estate determines by death is entitled to emblements, that is to say, the produce of the soil which is the result of his sowing. *Sir Henry Knivet's Case*, 5 Rep. 85; *Oland's Case*, 5 Rep. 116.

Right of executor of tenant for life to emblements.

Divorce is an act of law and does not disentitle a husband who holds during coverture. *Oland's Case*, *supra*.

He is not entitled when his estate determines by his own act, as by the marriage of a tenant for life during widowhood. *Oland's Case*, *supra*; Co. Lit. 55 b; *Davies v. Eytton*, 4 Moo. & P. 820; 7 Bing. 154.

Nor is he entitled where the crops are not sown by him. *Grantham v. Hawley*, Hob. 135; *Anon.*, Cro. Eliz. 61, 464; *Spencer's Case*, Winch, 51.

VI. FIXTURES.

Whatever is fixed to the freehold of land becomes part of the freehold or inheritance, and cannot be severed by a tenant for life.

Tenant for life cannot sever fixtures.

The question as to what are fixtures has rarely arisen between tenant for life and remainderman.

Whatever is strictly and properly part of the architectural design of a house as distinguished from mere ornament to be added afterwards passes with it. *D'Eyncourt v. Gregory*, 3 Eq. 382.

An engine put up by a tenant for life to work a colliery has been held to be removable by his executor. *Lawton v. Lawton*, 3 Atk. 13; *Lord Dudley v. Lord Warde*, Amb. 113.

Chap.
XXXIV.

VII. IMPROVEMENTS BY TENANT FOR LIFE.

Tenant for
life improves
at his own
risk.

A tenant for life who makes permanent improvements which increase the value of the inheritance, such as repairs necessitated by dry rot, building farm buildings and cottages, draining marshes and the like, does so at his own risk, and is not entitled to a charge for his expenditure. *Hibbert v. Cooke*, 1 S. & St. 552; *Bostock v. Blakeney*, 2 B. C. C. 653; *Nairn v. Marjoribanks*, 3 Russ. 582; *Dixon v. Peacock*, 3 Dr. 288; *Caldecott v. Brown*, 2 Ha. 144; *Dunne v. Dunne*, 7 D. M. & G. 207; *Dent v. Dent*, 30 B. 363; *In re Barrington's Settlement*, 1 J. & H. 142.

Salvage.

But he will be allowed expenditure made to preserve the property of which he is tenant for life from destruction or forfeiture. *Dent v. Dent*, 30 B. 363, 369 (the Aroa Mine).

On this principle he may complete a mansion house upon the estate left unfinished by the testator, and charge the inheritance with the cost. *Hibbert v. Cooke*, 1 S. & St. 552; *Dent v. Dent*, 30 B. 363.

And if he completes houses commenced by a testator on a building estate he may be entitled to the expenditure, if but for the outlay the buildings would have been lost to the estate. *Ferguson v. Ferguson*, 17 L. R. Ir. 567; see *Gelliland v. Crawford*, 1. R. 4 Eq. 35.

VIII. CHARGES AND INCUMBRANCES.

A. RENTCHARGES.

Rentcharges.

The tenant for life must keep down rentcharges upon the estate, and he is personally liable to pay them to the extent of the rents and profits he has received, but not further. *Thomas v. Sylvester*, L. R. 8 Q. B. 368; *Christie v. Barker*, 53 L. J. Q. B. 537; *Searle v. Cooke*, 43 Ch. D. 519; *Odium v. Thompson*, 31 L. R. Ir. 394.

Annuity in
nature of a
debt.

If the testator has entered into a covenant to pay an annuity or rentcharge, which is also charged on the land, and the

annuity or rentcharge is in the nature of a debt of the testator, for instance, if the annuity is granted in consideration of a loan or as the purchase money of the estate, it must, as between tenant for life and remainderman, be capitalised, and the burden borne in proportion to the value of their respective interests. *Bulwer v. Astley*, 1 Ph. 422; *Yates v. Yates*, 28 B. 637; *Yonge v. Furse*, 20 B. 380; *In re Muffett*; *Jones v. Mason*, 39 Ch. D. 534; see *In re Harrison*; *Townson v. Harrison*, 43 Ch. D. 55.

Another mode of apportioning the liability in such a case is that the tenant for life should pay the annuity as it accrues, in which case he will be entitled to a charge on the estate for the amount, but not to interest during his life on such charge. *In re Harrison*; *Townson v. Harrison*, 43 Ch. D. 55.

B. INTEREST ON MORTGAGES.

The tenant for life must keep down the interest on incumbrances upon the estate falling due while he is in possession to the extent of the income he receives, and surplus rents of one year must be applied in making up a deficit of earlier years. He is not bound to keep down arrears of interest accrued before his possession. *Dixon v. Peacock*, 3 Dr. 288; *Caulfield v. Maguire*, 2 J. & Lat. 141; *Whitbread v. Smith*, 3 D. M. & G. 741; *Making v. Making*, 1 D. F. & J. 358; *Sharshaw v. Gibbs*, Kay, 333; *Tracy v. Lady Hereford*, 2 B. C. C. 128; *Kirwan v. Kennedy*, I. R. 4 Eq. 499.

Interest on
mortgages.

The tenant for life is not personally liable to the mortgagee for such interest, and if he receives rents without keeping down the interest he cannot be sued by the mortgagee for back rents. *In re Morley*; *Morley v. Saunders*, 8 Eq. 594.

Back rents.

If the tenant for life does not keep down the interest to the extent of the rents and profits he receives, his estate may be sued by the remainderman for what the latter has to pay, owing to the tenant for life's default. *Baldwin v. Baldwin*, 4 Ir. Ch. 501; 6 Ir. Ch. 156, where Lord Romilly's dictum in *Kensington v. Bouverie*, 19 B. 39, is explained.

Liability to
remainder-
man.

**Chap.
XXXIV.**

Subsequent
rents liable
to make up
arrears.

If the remainderman has to pay interest on incumbrances which accrued during the life tenancy, and rents accrued during the life tenancy are afterwards recovered, it seems that in equity such rents, so far as required to recoup the remainderman, will be considered as belonging to the reversion. The right is not a mere lien, but the rents belong to the remainderman and he will take any accumulations produced by their investment. *Waring v. Coventry*, 2 M. & R. 406; *Kirwan v. Kennedy*, I. R. 3 Eq. 472; *Coote v. O'Reilly*, 1 J. & Lat. 455; *Howlin v. Sheppard*, I. R. 6 Eq. 38, 497, 532; see *Dillon v. Dillon*, 4 Ir. Ch. 102; *In re Fitzgerald's Estate*, I. R. 1 Eq. 453.

Tenant for
life paying
in excess of
rents.

If the tenant for life pays interest on incumbrances in excess of the income received he is not entitled to a charge for the excess, nor can he recover it from the remainderman. *Kensington v. Bouverie*, 7 H. L. 557.

C. ORDINARY OUTGOINGS.

Tenant for
life must
bear ordinary
outgoings.

As a general rule the tenant for life must bear the ordinary outgoings incident to the property of which he is tenant for life, such as rents payable under leases, premiums of insurance, and ordinary current repairs.

But the testator may give such directions by his will as will free the tenant for life from this liability. *In re Baring*; *Jeune v. Baring*, (1893) 1 Ch. 61.

Tenant's
valuation.

He must bear the valuation payable to an outgoing tenant and he has no claim for the amount against the estate. *Mansel v. Norton*, 22 Ch. D. 769.

Drainage
works.

As to extraordinary expenses, such as reinstating dangerous structures or drainage works, see *Ex parte Davis*, 3 De G. & J. 144; *In re Crawley*; *Acton v. Crawley*, 28 Ch. D. 431; *In re Barney*; *Harrison v. Barney*, (1894) 3 Ch. 562.

D. REDEMPTION OF INCUMBRANCES.

Right to
redeem.

The tenant for life may redeem incumbrances in priority to the remainderman. He cannot himself be redeemed, nor can he foreclose. *Ravald v. Russell*, You. 19; *Raffety v. King*, 1

Kee. 618; *Aynsley v. Reed*, 1 Dick. 249; *Wicks v. Scrivens*, 1 J. & H. 215.

Chap.
XXXIV.

If he pays off an incumbrance on the estate he is presumed to do so for his own benefit. *Jones v. Morgan*, 1 B. C. C. 206; *Shrewsbury v. Shrewsbury*, 1 Ves. Jun. 227; *Redington v. Redington*, 1 Ba. & Be. 131; *Burrell v. Earl of Egremont*, 7 B. 205; *Lindsay v. Earl of Wicklow*, I. R. 7 Eq. 192.

Tenant for life paying off incumbrances.

IX. POWERS OF LEASING.

Large powers of leasing are conferred upon tenants for life by the Settled Estates Act, 1877 (40 & 41 Vict. c. 18), and the Settled Land Act, 1882 (45 & 46 Vict. c. 38).

Leasing powers.

Where express power of leasing is given without limit of time it is a question of construction upon the whole instrument whether the power authorises leases beyond the life of the tenant for life. *Virian v. Jegon*, L. R. 3 H. L. 285.

Unlimited power.

Under the Settled Land Act, 1882, sect. 31 (2), a contract by a tenant for life for a lease binds the remainderman.

Contract for a lease.

Independently of the Act a contract for a lease by a tenant for life with power of leasing, if the lease contracted for was within the power, bound the remainderman. *Shannon v. Bradstreet*, 1 Sch. & L. 52; see *Morgan v. Milman*, 3 D. M. & G. 24.

And a covenant by a tenant for life to renew a lease at the expiration of an existing lease, though the covenant to renew is not authorised by the power, will bind the tenant for life if, when the time for renewal arrives, the renewed lease is within the power. *Harnett v. Yielding*, 2 Sch. & L. 549; *Doe d. Bromley v. Bettison*, 12 East, 305; *Dowell v. Dew*, 1 Y. & C. C. 345; 7 Jur. 117; *Gas Light and Coke Co. v. Touse*, 35 Ch. D. 519.

Covenant to renew lease.

X. FIDUCIARY POSITION OF TENANT FOR LIFE.

In some respects the tenant for life is in a fiduciary position as regards the estate.

Chap.
XXXIV.
—
Purchase of
incumbrances.

If he pays off an incumbrance he can charge the inheritance only with the amount paid. *Hill v. Browne*, Dru. t. S. 426.

A sum received by a tenant for life for withdrawing opposition to a bill must be invested for the benefit of the estate. *Owen v. Williams*, Amb. 734; *Pole v. Pole*, 2 De G. & S. 420; *Re Duke of Marlborough's Estates*, 13 Jur. 738; *Earl of Shrewsbury v. North Staffordshire Ry.*, L. R. 1 Eq. 593, 608; see *Yem v. Edwards*, 3 K. & J. 564; 1 De G. & J. 598.

Duty as
regards
renewable
leaseholds.

There is no duty imposed upon either legal or equitable tenants for life of renewable leaseholds to renew. *Nightingale v. Lawson*, 1 B. C. C. 443; *White v. White*, 4 Ves. 32; 9 Ves. 561; *Stone v. Theed*, 2 B. C. C. 248; *Montford v. Cadogan*, 19 Ves. 633; *Capel v. Wood*, 4 Russ. 500; *O'Ferrall v. O'Ferrall*, Ll. & G. t. P. 79; *Lawrence v. Maggs*, 1 Ed. 453; see *Trench v. St. George*, 1 Dr. & Wal. 417.

If the tenant for life does renew he will be taken to renew for the benefit of the estate though he may be himself the settlor. *Coppin v. Fernyhough*, 2 B. C. C. 291; *Bowles v. Stewart*, 1 Sch. & L. 209; *Giddings v. Giddings*, 3 Russ. 241; *Hill v. Mill*, 12 Ir. Eq. 107; *Mill v. Hill*, 3 H. L. 823.

It makes no difference that a particular renewal is directed to enure for the benefit of the trust. *Tanner v. Elworthy*, 4 B. 487.

Purchase of
reversion.

A purchase of the reversion by the tenant for life of renewable leaseholds enures for the benefit of the estate. *Phillips v. Phillips*, 29 Ch. D. 673.

If there is no trust to renew he is entitled to a charge for the purchase money.

If the fee is conveyed on the trusts of the will, the first tenant in tail who would have been absolutely entitled to the leaseholds is entitled to an interest equivalent to the residue of the term which would have been left at the death of the tenant for life. *Isaac v. Wall*, 6 Ch. D. 706.

If the fee is conveyed to the tenant for life the first tenant in tail is absolutely entitled. *Isaac v. Wall*, 6 Ch. D. 706.

Tenant for
life may pur-
chase estate.

The tenant for life may purchase the estate if sold under a power though the power is exerciseable with his consent. *Dicconson v. Talbot*, 6 Ch. 32; *Howard v. Ducane*, T. & R. 81.

And he may purchase for himself the reversion subject to a lease of which he is tenant for life. *Randall v. Randall*, 3 Mer. 190.

If the will contains no trust to insure and a policy is effected by the tenant for life, the policy moneys belong to him. *Warwicker v. Bretnall*, 23 Ch. D. 188.

Upon the curious point whether where a testator having no title to land devises to tenant for life and remainderman, and the tenant for life acquires a title by possession against the real owner, there is any estoppel or equity which will prevent him from holding the land against the remainderman, see *Paine v. Jones*, 18 Eq. 320; *Board v. Board*, L. R. 9 Q. B. 48; *In re Stringer's Estate*; *Shaw v. Jones-Ford*, 6 Ch. D. 1.

Chap.
XXXIV.

Purchase of
reversion.

Policy
moneys.

Settlement by
testator who
has no title.

XI. RENEWABLE LEASEHOLDS.

In the case of fines for the renewal of leaseholds given for life with remainders, the Court will, if no directions are given how the fine is to be paid, apportion the fine between tenant for life and remainderman according to their enjoyment.

Court appor-
tions liability
for fines.

A direction to renew "out of rents and profits" or to renew "out of rents and profits or by mortgage" will not alone throw the fines upon the tenant for life. *Allan v. Backhouse*, 2 V. & B. 85, on appeal, Law Mag. vol. 25, p. 112; *Greenwood v. Evans*, 4 B. 44; *Jones v. Jones*, 5 Ha. 440; *Reeves v. Creswick*, 3 Y. & C. Ex. 715; *Lewin on Trusts*, 408; *Ainslie v. Harcourt*, 28 B. 313; see *In re Marquess of Bute*; *Marquess of Bute v. Ryder*, 27 Ch. D. 196.

Effect of
direction to
renew.

But the will may throw the expense of renewals upon the tenant for life, for instance, by imposing the duty of renewal upon him personally by name (a); by a trust to renew out of rents and profits, and a gift of the rents and profits to him subject to the trust (b), or of the surplus rents and profits only (c); or by a direction to pay fines out of the annual rents (d). *Blake v. Peters*, 1 D. J. & S. 345 (a); *Lord Montford v. Lord Cadogan*, 17 Ves. 485; 19 Ves. 635; 2 Mer. 3; *Earl of Shaftesbury v. Duke of Marlborough*, 2 M. & K. 111 (b);

Chap.
XXXIV.

Fines raised
by mortgage.

Stone v. Theed, 2 B. C. C. 247 ; 5 Ha. 451, note (c) ; *Solley v. Wood*, 20 B. 482 (d).

If the fines are to be raised out of the rents and profits or by mortgage, the tenant for life is bound to keep down the interest on the whole sum if raised by mortgage and not merely upon that portion of it which is ultimately paid by him. *Greenwood v. Evans*, 4 B. 44 ; *Playters v. Abbott*, 2 M. & K. 97 ; *Reeves v. Creswick*, 3 Y. & C. 715 ; *Ainslie v. Harcourt*, 28 B. 313 ; *Jones v. Jones*, 5 Ha. 440.

Apportion-
ment of costs
of renewal.

In the absence of any direction how the cost of renewal is to be borne, the rules are :—

a. If the tenant for life gets no advantage from the renewal, the sum to be paid by the remainderman is the sum actually paid with compound interest at 4 per cent. down to the death of the tenant for life and simple interest afterwards. *Nightingale v. Lawson*, 1 B. C. C. 440 ; *White v. White*, 9 Ves. 557 *Giddings v. Giddings*, 3 Russ. 260.

b. If the tenant for life lives to enjoy the benefit of the renewal, the remainderman has to pay a sum bearing the same proportion to the whole sum paid as the benefit he gets from the renewal bears to the whole of the renewed lease with interest as before ; cases *supra*.

c. In the case of renewable leaseholds for lives the same principles apply, the value of the lives being calculated at the time of the renewal according to the tables framed for the purpose, the chance that the new life may fail during the subsistence of the other *cestuis que vie* being apparently thrown upon the remainderman. *Jones v. Jones*, 5 Ha. 440 ; *Harris v. Harris*, 32 B. 333 ; *Bradford v. Brownjohn*, 3 Ch. 711.

Title to fund
for renewal
when renewal
impossible.

If the testator has directed the creation of a fund for renewal out of the rents, and the power of renewal is subsequently destroyed, the remainderman will be entitled to the fund for renewal, or to the purchase money if the leaseholds are sold as soon as renewal becomes impossible, if the object of the testator was to keep the leaseholds perpetually renewed at any cost. *In re Wood's Estate*, 10 Eq. 572 ; *Hollier v. Burne*, 16 Eq. 163 ; *Maddy v. Hale*, 3 Ch. D. 327 ; see *In re Lord Ranelagh's Will*, 26 Ch. D. 591

The fund must be invested in ordinary securities, and the tenant for life takes the dividends. *In re Barber's Settled Estates*, 18 Ch. D. 624.

Chap.
XXXIV.

If renewal becomes impossible through the act of the testator, the trust is at an end. *Penfold v. Shillingford*, 46 L. J. Ch. 491.

If only a reasonable sum is to be applied in renewals, the tenant for life will be entitled to the whole fund. *Morris v. Hodges*, 27 B. 625; *In re Money's Trusts*, 2 Dr. & Sm. 94; 10 W. R. 399; see *Hayward v. Pile*, 5 Ch. 214.

XII. RIGHT TO POSSESSION.

An equitable tenant for life is not entitled as of right to possession, but the Court has a judicial discretion as to giving him possession, and having regard to the large powers conferred upon tenants for life by the Settled Land Acts, an equitable tenant for life will be let into possession upon proper undertakings for the protection of the estate. *In re Bentley*, 54 L. J. Ch. 782; *In re Wythes*; *West v. Wythes*, (1893) 2 Ch. 369; *In re Bagot's Settlement*; *Bagot v. Kittoe*, (1894) 1 Ch. 177.

Court may let equitable tenant for life into possession.

As a general rule a tenant for life of chattels is bound to sign an inventory, but not to give security. *Foley v. Burnell*, 1 B. C. C. 279; *Conduitt v. Soane*, 1 Coll. 285.

Inventory of chattels.

XIII. TITLE DEEDS.

The right to possession of the title deeds follows the legal estate; therefore legal tenant for life is entitled to the title deeds. *Garner v. Hannington*, 22 B. 627, 630; *Allwood v. Heywood*, 1 H. & C. 745; *Leathes v. Leathes*, 5 Ch. D. 221.

Legal tenant for life entitled to title deeds.

But if there is any probability that he will make a wrongful use of them, as for instance by taking them out of the jurisdiction, or if they are required for the purposes of an action, they may be secured in Court. *Jenner v. Morris*, L. R. 1 Ch. 603; *Stanford v. Roberts*, 6 Ch. 310.

Chap.
XXXIV.

The remainderman is entitled to have the title deeds produced for the purposes of a sale or otherwise where there is no dispute about his title. *Davies v. Earl of Dysart*, 20 B. 405; *Pennell v. Earl of Dysart*, 27 B. 542.

Equitable
tenant may
have possession
of title
deeds.

And possession of the title deeds will also be given to an equitable tenant for life upon an undertaking not to part with them and to produce them to the trustees on all reasonable occasions. *In re Burnaby's Settled Estate*, 42 Ch. D. 621; *In re Wythes*; *West v. Wythes*, (1893) 2 Ch. 369.

XIV. CAPITAL AND INCOME.

Trees blown
down before
the death.

1. Trees blown down and severed from the soil before the testator's death belong to his estate. The question whether the tree is severed or not is one of fact. *In re Ainslie*; *Swinburn v. Ainslie*, 30 Ch. D. 485.

Fines and
casual profits.

2. Fines payable on the renewal of leases subject to which an estate is devised, fines on admission to copyholds, and casual profits belong to the tenant for life. *Earl Cowley v. Wellesley*, 85 B. 635; L. R. 1 Eq. 656; *Brigstocke v. Brigstocke*, 8 Ch. D. 357.

Accumulation
during
minority of
tenant for
life.

3. Accumulations of income made during the minority of the tenant for life belong to him absolutely. Sect. 43 of the Conveyancing Act does not affect the point. *In re Wells*; *Wells v. Wells*, 43 Ch. D. 281; *In re Humphreys*; *Humphreys v. Levett*, (1893) 3 Ch. 1.

Dividends
on shares.

4. Dividends declared before the death of the tenant for life, though not paid till afterwards, belong to his representatives. *Wright v. Tuckett*, 1 J. & H. 266.

Dividends on shares in a company declared after the death of the tenant for life, though earned before his death, go to the remainderman. *Mackinley v. Bates*, 31 B. 280.

Partnership
profits.

5. On the other hand partnership profits declared for a past period are the income of that period. *Ibbotson v. Elam*, L. R. 1 Eq. 188; *Browne v. Collins*, 12 Eq. 586.

Debts.

6. Debts are the profits of the period when they are got in.

Maclaren v. Stainton, 3 D. F. & J. 202; *Edmondson v. Crosthwaite*, 34 B. 30.

7. A fund created for the protection of property given for life is capital. *Varlo v. Faden*, 1 D. F. & J. 211.

Chap.
XXXIV.

Fund for
protection of
property.

8. As between successive tenants for life of a business, it has been held that losses incurred during the life of one tenant for life must be made good out of profits earned during the life of the next tenant for life, and not out of capital. *Upton v. Brown*, 26 Ch. D. 588; see too, *Gow v. Foster*, 26 Ch. D. 672; *Re Millechamp*, 52 L. T. 758.

Losses of
business.

9. Where a company has no power to increase its capital but has accumulated profits, which it uses in fact for capital purposes, and afterwards distributes them among its proprietors, the sums distributed are capital. *Brander v. Brander*, 4 Ves. 800; *Irving v. Houston*, 4 Paton Sc. App. 521; *Paris v. Paris*, 10 Ves. 185; *Clayton v. Gresham*, 10 Ves. 288; *Witts v. Steere*, 13 Ves. 363; *Ex parte Hodgens, re Hodgens*, 11 Ir. Eq. 99; *Ward v. Combe*, 7 Sim. 634; *Bouch v. Sproule*, 12 App. C. 385.

Accumulated
profits of
trading com-
panies.

But where an extra dividend is paid by such a company out of the half-year's profits, the dividend is income. *Barclay v. Wainewright*, 14 Ves. 66; *Price v. Anderson*, 15 Sim. 473; *Preston v. Melville*, 16 Sim. 163.

10. Where a company has power either to distribute its profits as dividend or to convert them into capital, the tenant for life is entitled to all dividends or bonuses declared by the company during his lifetime. *In re Barton's Will*, 5 Eq. 238; *Dale v. Hayes*, 19 W. R. 299; *In re Hopkin's Trusts*, 18 Eq. 696; *In re Bouch*; *Sproule v. Bouch*, 29 Ch. D. 635; *S. C. Bouch v. Sproule*, 12 App. C. 385; *In re Alsbury*; *Sugden v. Alsbury*, 45 Ch. D. 237; *In re Armitage*; *Armitage v. Garnett*, (1893) 3 Ch. 337; *In re Malam*; *Malam v. Hitchens*, (1894) 3 Ch. 578.

Dividends
and bonuses.

It is immaterial that the bonus or dividend is partly derived from profits accumulated before the testator's death. Cases *supra*. The expressions of a contrary opinion in *Plumbe v. Neild*, 29 L. J. Ch. 618; *Hollis v. Allan*, 14 W. R. 980; *Nicholson v. Nicholson*, 30 L. J. Ch. 617, are overruled.

The tenant for life has no claim upon profits made during his

Chap.
XXXIV.

lifetime except so far as they have been distributed as bonus or dividend. *In re Armitage, supra.*

Where such a company validly appropriates sums which might have been applied in dividend to an increase of capital, the appropriation is binding on the tenant for life. *In re Barton's Will, supra; Bouch v. Sproule, supra.*

Allotment of
new shares.

Where new shares in a company are allotted in respect of old shares held by the testator, the excess in value of the shares above the price paid is capital. *Re Bromley; Sanders v. Bromley*, 55 L. T. 145.

Where, upon such an allotment, the new shares are paid for in part out of dividends which would otherwise come to the tenant for life, he is entitled only to a charge on the new shares to the amount of the dividends so applied. *In re Malam; Malam v. Hitchens*, (1894) 3 Ch. 576.

Sale of assets.

Where on a sale of the assets of a company, shareholders receive in cash more than the nominal value of their shares, the excess is capital, although the assets include a fund which might have been distributed as dividend. *In re Armitage; Armitage v. Garnett*, (1893) 3 Ch. 337.

XV. RESIDUE GIVEN TO PERSONS IN SUCCESSION.

A. Where there is a trust to convert.

Residue
given on
trust to sell
must be
treated as
sold.

Where a residue is given upon trust for sale and investment, and the income is then given to a tenant for life, the tenant for life is, in the absence of proper directions, only entitled to such income as the estate would produce when converted and invested in accordance with the directions of the will.

Specific
enjoyment.

Mere powers of management, such as a power to postpone conversion, will not entitle the tenant for life to the income of the unconverted property, but he will be so entitled if there is a direction to apply the income until sale in the same manner as the income of the trust estate. *In re Chancellor; Chancellor v. Brown*, 26 Ch. D. 42.

And if there is power to retain investments and what is given to the tenant for life is the income of the securities

representing the estate, he is entitled to the income actually produced by the estate. *In re Thomas; Wood v. Thomas*, (1891) 3 Ch. 483.

Chap.
XXXIV.

When realty was settled upon trust for sale it was held that the tenant for life was entitled to the rents accrued before the land was sold, there being no undue delay in selling. *Hope v. D'Hédouville*, (1893) 2 Ch. 361.

B. Where there is no trust to convert.

In such a case the rule is that when a residue of personalty is given *en masse* to several persons successively, wasting property, and property invested in a manner not authorised by the will, must be converted, unless it appears from the will that specific enjoyment by the tenant for life was intended. *Howe v. Lord Dartmouth*, 7 Ves. 137; *Johnson v. Johnson*, 2 Coll. 441; *Thornton v. Ellis*, 15 B. 193; *Macdonald v. Irvine*, 8 Ch. D. 101; see *Wightwick v. Lord*, 6 H. L. 217.

Conversion of residuary personalty given to several persons successively.

And in the same way the tenant for life is entitled to have reversionary property converted, though the reversion is dependent upon his own life interest. *Wilkinson v. Duncan*, 23 B. 469; *Johnson v. Routh*, 3 Jur. N. S. 1041; 27 L. J. Ch. 305; *Countess of Harrington v. Atherton*, 3 D. J. & S. 352.

As to what is sufficient evidence of intention that the property left by the testator was to be specifically enjoyed:

Where the will contains the usual power to postpone conversion, and a direction that the rents, profits and income until sale are to be applied in the same way as the income arising from the proceeds of sale, the tenant for life is entitled to the profits of a business carried on by the trustees. *In re Chancellor; Chancellor v. Brown*, 26 Ch. D. 42.

What will entitle the tenant for life to specific enjoyment.

The fact that the residuary gift includes real estate, the devise of which is specific, does not entitle the tenant for life to specific enjoyment of the residuary personalty. *Howe v. Lord Dartmouth*, 7 Ves. 137.

A discretionary power to convert, when trustees may think fit, does not entitle the tenant for life to the enjoyment of the property in specie in the meantime. *Wilkinson v. Duncan*, 23 B. 469; *Llewellyn's Trust*, 29 B. 171; *Yates v. Yates*,

Discretionary power to convert when trustees may think fit.

Chap.
XXXIV.

28 B. 637; *Caldecott v. Caldecott*, 1 Y. & C. C. 312; *Meyer v. Simonsen*, 5 De G. & S. 723; *Brown v. Gellatly*, L. R. 2 Ch. 751; see *Simpson v. Lister*, 4 Jur. N. S. 1269.

Nor does a direction to convert from time to time for payment of debts imply that there is to be a conversion for no other purpose. *Caldecott v. Caldecott*, 1 Y. & C. C. 312, 737.

But an absolute discretion to sell "such parts and so much as should be necessary" to pay debts, affords an argument that the tenant for life is to enjoy specifically such parts as the trustees do not sell. *In re Sewell's Estate*, 11 Eq. 80; see *In re Leonard*; *Theobald v. King*, 29 W. R. 234.

And if a discretion to convert is given, "notwithstanding" the gift to the tenant for life, the tenant for life will be entitled in specie till conversion. *Burton v. Mount*, 2 De G. & S. 383.

The tenant for life is entitled in the meantime, if there is a direction to pay the produce of any portion not converted to him. *Johnston v. Moore*, 27 L. J. Ch. 453; *Mackie v. Mackie*, 5 Ha. 70; *Wrey v. Smith*, 14 Sim. 202; *Morley v. Mendham*, 2 Jur. N. S. 998; *Lean v. Lean*, 23 W. R. 484; *Miller v. Miller*, 13 Eq. 263.

An express power to sell realty affords no argument for the specific enjoyment of wasting securities. *Jebb v. Tugwell*, 20 B. 84.

Power to retain.

A power to retain investments would not entitle the tenant for life to specific enjoyment. *Porter v. Baddeley*, 5 Ch. D. 542.

But a power to retain investments or to sell and invest the proceeds on such securities as the trustees think proper, has been held sufficient to give the tenant for life specific enjoyment. *Gray v. Siggers*, 15 Ch. D. 74; *In re Sheldon*; *Nixon v. Sheldon*, 39 Ch. D. 50.

Where the gift is not of a residue simply but of specific enumerated things.

The tenant for life will be entitled to enjoy the property in specie as it existed at the death of the testator, where the gift is not merely of a residue, but there is an enumeration of certain specific things. *Lord v. Godfrey*, 4 Mad. 455; *Vaughan v. Buck*, 1 Ph. 75; *Vincent v. Newcombe*, Young, 599; *Blann v. Bell*, 2 D. M. & G. 775; *Hood v. Clapham*, 19 B. 90; *Bowden v. Bowden*, 17 Sim. 65; *Boys v. Boys*, 28 B. 436; *Pickering v.*

Pickering, 4 M. & Cr. 289; *Thursby v. Thursby*, 19 Eq. 395. *Mills v. Mills*, 7 Sim. 501, is not easily reconcilable with the other authorities.

Chap.
XXXIV.

And in such a case the fact that a discretionary power to convert is given makes no difference. *Simpson v. Lister*, 4 Jur. N. S. 1269; *Bethune v. Kennedy*, 1 M. & Cr. 114; *Hubbard v. Young*, 10 B. 203; *Thursby v. Thursby*, *supra*.

The argument, however, in favour of specific enjoyment of things expressly enumerated is less strong where the gift is through the medium of a trust. *Craig v. Wheeler*, 29 L. J. Ch. 374; 8 W. R. 172.

On the other hand, notwithstanding a partial enumeration of specific things, the gift may in effect be merely residuary. *Sutherland v. Cooke*, 1 Coll. 894, where the gift was of "all my money in the Long Annuities, and in all or any other of the public stocks or funds, ready money and securities for money, outstanding debts, and all the rest, residue, and remainder of my estate and effects, whatsoever and wheresoever, and of what nature or kind soever the same shall or may consist at the time of my decease, not hereinbefore specifically disposed of," to trustees, who were directed by sale thereof, or of so much as should be necessary to pay debts, &c.

Again, though the gift may be of a pure residue, the testator may show that he contemplates specific enjoyment.

When the gift is of residue simply there may be an intention to give specific enjoyment.

In a will before the Wills Act, if the tenant for life is to take the rents, issues, and profits, he will be entitled to the specific enjoyment of leaseholds, if there are no freeholds to which the term rents may apply. *Goodenough v. Tremamondo*, 2 B. 513; *Cafe v. Bent*, 5 Ha. 24.

But in wills since the Wills Act the word rents by itself, will not have this effect where it is used with other words, none of which have the same specific force. *Pickup v. Atkinson*, 4 Ha. 624; see *Booth v. Coulton*, 7 Jur. N. S. 207; *Wearing v. Wearing*, 23 B. 99; *Vachell v. Roberts*, 32 B. 140; *Marshall v. Bremner*, 2 Sm. & G. 237.

Use of the words rents and profits.

If the property is specifically given over at the death of the tenant for life, he is entitled to enjoyment in specie. *House v. Way*, 12 Jur. 958; 18 L. J. Ch. 22; *Harris v. Poyner*,

Gift over of the property in specie at death of the tenant for life.

Chap.
XXXIV.

1 Dr. 174; *Collins v. Collins*, 2 M. & K. 703; *D'Aglic v. Fryer*, 12 Sim. 1.

A gift of a specific part of the residue at the death of the tenant for life will entitle the tenant for life to the specific enjoyment of that part. *Holgate v. Jennings*, 24 B. 623; *Macdonald v. Irvine*, 8 Ch. D. 101.

But this is not the case if the gift at the death of the tenant for life is a mere general gift, though it may be of something which forms part of the residue at the testator's death. *Lichfield v. Baker*, 2 B. 481; 13 B. 447.

Express trust
to convert at
the death of
the tenant
for life.

An express trust to convert at the death of the tenant for life entitles the tenant for life to specific enjoyment. *Alcock v. Soper*, 2 M. & K. 699; *Harvey v. Harvey*, 5 B. 134; *Daniel v. Warren*, 2 Y. & C. C. 290; *Rowe v. Rowe*, 29 B. 276.

And where the conversion of a portion is expressly postponed for a certain time, the tenant for life is entitled to specific enjoyment in the meantime. *Green v. Britten*, 1 D. J. & S. 649.

Power to sell
with consent
of the tenant
for life or to
renew lease-
holds.

Similarly the tenant for life is entitled where there is a power to sell with his consent, or to renew leaseholds. *Hinves v. Hinves*, 3 Ha. 611; *Hind v. Selby*, 22 B. 373; *Skirving v. Williams*, 24 B. 275; *Crowe v. Crisford*, 17 B. 507.

Debts must
be got in.

Where the tenant for life is entitled to the enjoyment in specie of the property of the testator as existing at his death, the debts must nevertheless be got in. *Holgate v. Jennings*, 24 B. 623.

C. Where there is no right to specific enjoyment, the following rules apply as between tenant for life and remainderman :

What residue
is.

1. The residue is what remains after taking such portion of the capital as, together with the income of such portion for one year, whatever that income may be, is required to pay the testator's debts and legacies. *Allhusen v. Whittell*, 4 Eq. 294; *Lambert v. Lambert*, 16 Eq. 320; *Marshall v. Crowther*, 2 Ch. D. 199; *Aikin v. Butler*, Seton on Decrees, p. 1412.

Property
properly
invested.

2. The tenant for life is entitled from the testator's death to the income of so much of the property as is invested on authorized securities. *Brown v. Gellatly*, L. R. 2 Ch. 751.

3. With regard to unauthorized securities, the tenant for life is entitled from the testator's death to the income which would be produced by the money upon unauthorized security, if invested on authorized security at the end of a year from the testator's death. *Dimes v. Scott*, 4 Russ. 195; *Taylor v. Clark*, 1 Ha. 161; *Brown v. Gellatly*, L. R. 2 Ch. 751.

Chap.
XXXIV.
Unauthorised
securities.

In some cases the investment in authorized securities has been treated as made at the testator's death. *Hume v. Richardson*, 4 D. F. & J. 29; 31 L. J. Ch. 713.

No allowance can be made to the tenant for life for the fact that securities are sold at a higher or lower rate between two dividends. *Scholefield v. Redfern*, 2 Dr. & Sm. 173; *Freman v. Whitbread*, L. R. 1 Eq. 266.

And the tenant for life cannot be required to make an allowance where stocks are bought at a time when several months' dividend has accrued on them. *In re Clarke*; *Barker v. Perowne*, 18 Ch. D. 160.

4. With regard to property which cannot be converted within the year or which is retained for the convenience of the estate, the tenant for life is entitled from the testator's death to interest at 4 per cent. upon the then value of such property. *Meyer v. Simonsen*, 5 De G. & S. 723; *Brown v. Gellatly*, L. R. 2 Ch. 751; *Furley v. Hyder*, 42 L. J. Ch. 626; see *Arnold v. Enis*, 2 Ir. Ch. 601; *In re Eaton*; *Daines v. Eaton*, W. N., (1894) 95; 70 L. T. 761.

Property
which cannot
be converted.

Where a fund is without authority employed in a business in which large profits are earned, the tenant for life is entitled to interest at 4 per cent. on the fund and on the profits beyond 4 per cent., which must be treated as capital. *In re Hill*; *Hill v. Hill*, 50 L. J. Ch. 551.

5. In *Gibson v. Bott*, 7 Ves. 89, the tenant for life was allowed interest from the death on the value at the death of leaseholds which could not be sold on account of a flaw in the title. See note 1 Y. & C. C. 320.

6. Where personalty is directed to be laid out in land the tenant for life is entitled to the income from the testator's death. *Macpherson v. Macpherson*, 1 Macq. 243.

Personalty to
be laid out in
land.

Chap.
XXXIV.

Reversionary
property must
be sold.

Where accumulation is directed till investment, one year is allowed. *Sitwell v. Barnard*, 6 Ves. 520.

7. Reversionary property must be sold under trusts for conversion and if the testator gives his trustees a discretion as to the period of conversion, interest will be allowed upon the value of the reversion at the end of a year from the death. *Wilkinson v. Duncan*, 23 B. 469; *Johnson v. Routh*, 3 Jur. N. S. 1041; 27 L. J. Ch. 305; *Countess of Harrington v. Atherton*, 3 D. J. & S. 352.

Income of
fund to pay
contingent
or vested
legacies.

8. The tenant for life is entitled to the income of a fund set apart to pay contingent legacies. *Crawley v. Crawley*, 7 Sim. 427; *Fullerton v. Martin*, 1 Dr. & Sm. 31; *Cranley v. Dixon*, 23 B. 513; *Allhusen v. Whittell*, 4 Eq. 295.

But the income which accrues on a fund set apart to meet vested legacies must be treated as capital and invested, the tenant for life being only entitled to the income arising from the investment. *In re Whitehead*; *Peacock v. Lucas*, (1894) 1 Ch. 678.

Apportion-
ment of
recovered
assets.

9. With regard to assets recovered after the testator's death, it is now settled, after some fluctuation of opinion, that the tenant for life is entitled to the difference between the sum recovered and the sum which, invested at 4 per cent. at the testator's death and calculated with yearly rests, would have amounted to the sum recovered. *Beavan v. Beavan*, 24 Ch. D. 649 n.; *In re Earl of Chesterfield's Trusts*, 24 Ch. D. 643; *In re Hobson*; *Walker v. Appach*, 55 L. J. Ch. 422; 53 L. T. 627; 34 W. R. 70; *In re Godden*; *Teague v. Fox*, (1893) 1 Ch. 242.

The same rule applies to reversions which fall in before they are sold. *In re Hobson*, *supra*; *Re Flower*; *Matheson v. Goodwyn*, 62 L. T. 216; 63 L. T. 201.

Apportion-
ment of lost
assets.

10. Where assets are lost after the testator's death, the tenant for life is chargeable with the difference between the sum lost and the sum which, invested at 4 per cent. at the testator's death and calculated with yearly rests, would have amounted to the sum lost. *In re Hengler*; *Frowde v. Hengler*, (1893) 1 Ch. 586.

11. As to the apportionment of loss on a mortgage security which turns out insufficient, see *In re Moore*; *Moore v.*

Johnson, 54 L. J. Ch. 432; 52 L. T. 510; 33 W. R. 447; *In re Foster*; *Lloyd v. Carr*, 45 Ch. D. 629.

Chap.
XXXIV.

12. Where land subject to a beneficial lease is taken under the Lands Clauses Consolidation Act, 1845, sect. 74, or sold under the Settled Land Act, 1882, sect. 34, the tenant for life is entitled during the continuance of the term to so much of the income of the purchase moneys as equals the rent under the lease. The rest of the income must be accumulated until the date when the lease would have expired, and from that date the tenant for life is entitled to the whole income, including the income of accumulations. *In re Wootton's Estate*, L. R. 1 Eq. 589; *In re Mette's Estate*, 7 Eq. 72; *In re Wilkes' Estate*, 16 Ch. D. 597; *Cottrell v. Cottrell*, 28 Ch. D. 628.

Apportion-
ment on sale
of reversion.

Where a leasehold interest is disposed of under one or other of these Acts the tenant for life is entitled to an annuity of such an amount that the payment of it would exhaust the purchase-money in the number of years which the leaseholds had to run. *In re Phillips' Trusts*, 6 Eq. 250; *Askew v. Woodhead*, 14 Ch. D. 27; *Seton*, 2030.

Apportion-
ment on sale
of leaseholds.

CHAPTER XXXV.

CONDITIONS PRECEDENT—VESTING.

CONDITIONS DISTINGUISHED.

Chap. XXXV. 1. THE Court is never astute to construe a testator's words as importing a condition if a different meaning can be fairly given to them.

Condition and trust.

Thus, a devise "upon condition" that the devisee makes certain payments within a given time will, as a rule, be construed as a trust, and not as a condition. *Young v. Grove*, 4 C. B. 668; *Wright v. Wilkin*, 9 W. R. 161; 10 W. R. 403; see *A.-G. v. Wax Chandlers*, L. R. 6 H. L. 1; *A.-G. v. Merchant Taylors*, 6 Ch. 512; and see *Bird v. Harris*, 9 Eq. 204; *Foot v. Cunningham*, L. R. 11 Eq. 306; *Re Cowley*; *Souch v. Cowley*, 53 L. T. 494; *Re Oliver*; *Newbald v. Beckett*, 62 L. T. 533.

Condition and limitation.

2. In some cases a condition apparently precedent has been read as forming part of the original limitation. Thus, a devise to M. and the heirs of her body, on condition that she marry and have issue male by S., was held to give an estate in special tail to M. *Page v. Hayward*, 2 Salk. 570.

Similarly, an estate to arise upon a condition, which cuts down a previous estate will, if possible, be construed as a remainder by looking upon the condition as forming part of the limitation of the previous estate. Thus, a devise to A. for life if she should not marry again, but if she should, to B., will be construed as a devise to A. for life or till marriage. *Luaford v. Cheek*, 3 Lev. 125; *Lady Ann Fry's Case*, 1 Ventr. 203; *Gordon v. Adolphus*, 3 B. P. C. 306.

Devise for life

So, too, if the gift for life is made "subject to the proviso

hereinafter contained," the proviso is incorporated into the original limitation. *Webb v. Grace*, 2 Ph. 701.

Chap. XXXV.

subject to a proviso.

And a bequest to A. for life, if she should so long remain unmarried, will be construed in the same way. *Heath v. Lewis*, 3 D. M. & G. 954; *In re Moore*; *Trafford v. Maconochie*, 39 Ch. D. 116.

On the other hand, if the condition is so penned that it cannot be connected with the previous limitation for life, it must take effect as a condition. *Sheffield v. Lord Orrery*, 3 Atk. 282; see *Allen v. Jackson*, 1 Ch. D. 399.

In such a case, however, it may appear that the original estate was only meant to last till the condition takes effect, if, for instance, the rents are directed to be paid to a woman, which could only be done till her marriage, the estate not being given to her separate use. *Meeds v. Wood*, 19 B. 215.

Upon the same principle, the ordinary limitation to trustees to preserve contingent remainders is a vested remainder, the prior estate being looked upon as lasting till forfeiture by the prior taker. *Smith d. Dormer v. Parkhurst*, 18 Viner, fol. 413; 3 Atk. 135; 4 B. P. C. 353.

Estate of trustees to preserve.

CHARACTERISTICS OF CONDITIONS PRECEDENT.

Whether a condition is subsequent or precedent must depend on the language in which it is framed, and very little help can be derived from decided cases on the point. It may, however, be noticed, that when the condition requires something to be done, which will take time, the argument is in favour of construing it as a condition subsequent. *Popham v. Bampffield*, 1 Vern. 79; 1 Eq. Ab. 108, pl. 2; *Peyton v. Bury*, 2 P. W. 626; *Duddy v. Gresham*, 2 L. R. Ir. 443.

General test of condition precedent.

On the other hand, a condition, which involves anything in the nature of consideration, is in general a condition precedent. *Acherley v. Vernon*, Willes, 153; *In re Wellstead*, 25 B. 612.

If a devise be made to take effect only on performance of some particular duty by the devisee, or upon some particular event, there is no gift unless the condition is fulfilled. And it makes no difference that the event is impossible, impolitic,

Condition precedent whether impossible, impolitic, or illegal, must

Chap. XXXV. or illegal. See *Egerton v. Earl Brounlow*, 4 H. L. 1; *Priestley v. Holgate*, 3 K. & J. 286; see *Caldwell v. Cresswell*, 6 Ch. 278.

In personalty condition precedent involving a physical impossibility is invalid.

But as regards personalty, a gift made upon a condition precedent involving a physical impossibility, such as to drink up the ocean, takes effect notwithstanding the condition. See 1 Swin., Part IV., sec. 6, p. 257; Co. Lit. 206 b.

But if the condition precedent, though in fact impossible at the date of the will, or becoming impossible by subsequent events, involves no physical impossibility, the gift will not take effect. *Lowther v. Cavendish*, 1 Ed. 99, 116; *Robinson v. Wheelwright*, 21 B. 214; 6 D. M. & G. 535.

Condition discharged by testator.

As regards realty and personalty, a condition precedent which becomes impossible by the act of the testator is discharged. Co. Lit. 206 b., sec. 334; *Guth v. Barton*, 1 B. 478; *Darley v. Langworthy*, 3 B. P. C. 359.

Condition *contra bonos mores*.

In personalty a condition precedent which is *contra bonos mores* may be rejected, leaving the gift absolute. *Brown v. Peck*, 1 Ed. 140; *Wren v. Bradley*, 2 De G. & S. 49.

But this principle does not apply to conditional limitations. *In re Moore*; *Trafford v. Maconochie*, 39 Ch. D. 116.

Effect of conditions on infants.

Where a condition precedent is imposed on an infant, and it can be performed by him but is not, the limitation over takes effect; but a proviso defeating a vested estate, if the taker of the estate refuses or neglects to do something, is not applicable to an infant. *Bevan v. Mahon-Hagan*, 27 L. R. Ir. 399; 31 L. R. Ir. 342; *Partridge v. Partridge*, (1894) 1 Ch. 351.

VESTING OF REAL ESTATE.

General leaning in favour of vesting.

The Courts lean strongly in favour of early vesting. "Whilst estates remain contingent, those in whom they are at a future time to be vested have no interest in the estates or the rents and profits of such estates. Such estates must descend to the heir, if they are not given to any person to hold until the events happen on which they are to become vested. Testators who create contingent estates often forget to make any provision for the preservation of their estates, and for the disposition of the

rents and profits in the intermediate period between their deaths and the vesting of their estates. In such cases the estates descend to the heirs, who, knowing that they are to enjoy them only for a short period, and that they have obtained the possession of them from the inattention, and not from the bounty of, the testator, or from the mistake of the professional man who drew the will, will make the most that they can of them during the time that they remain theirs, regardless of any injury that the estates may suffer from their conduct. The rights of the different members of families not being ascertained while estates remain contingent, such families continue in an unsettled state, which is often productive of inconvenience and sometimes of injury to them. If the attaining a certain age be a condition precedent to the vesting estates, by the death of their parents before they are of that age, children lose estates which were intended for them, and which their relation to the testator may give them the strongest claim to." *Per* Best, C.J., *Duffield v. Duffield*, 3 Bl. N. S. 330; 1 Dow, N. S. 310.

A devise to A. and his heirs "if" or "when" he attains twenty-one is contingent according to the opinion of Fearne, *Post. Works*, 191. So, too, "a devise in remainder to a class of children if they attain twenty-one is a contingent remainder. It is also a contingent remainder if it be a devise to a class of children equally at the age of twenty-one. And so also it is a contingent remainder if it be a devise in remainder to children who shall attain the age of twenty-one." *Per* Stuart, V.-C., in *Browne v. Browne*, 3 Sm. & G. 587; *Alexander v. Alexander*, 16 C. B. 59; *Love v. Love*, 7 L. R. Ir. 306; see *Jull v. Jacobs*, 3 Ch. D. 703.

Cases, however, where the condition as to attaining a certain age forms part of the original devise, must be distinguished from those cases, where the condition is contained in a separate direction; thus, where there has been an immediate devise followed by a clause directing that the devisee "is not to be of age to receive this" till he attains a certain age, or that it is to become his property on attaining twenty-five, the devisee has taken a vested interest subject to be divested. *Snow v. Poulden*, 1 Kee. 186; *Attwater v. Attwater*, 18 B. 330.

Chap. XXXV.

Devise
"when" or
"if" is con-
tingent.

Condition
requiring the
attainment of
a certain age
may some-
times be
subsequent.

Chap. XXXV.

So, too, a devise to A., provided she lives to attain twenty-one, has been held vested subject to be divested. *Simmonds v. Cocks*, 29 B. 455, where the devise was after a life estate.

Express direction as to vesting.

Of course, when there is an express direction as to the period of vesting, nothing can vest before the appointed time ; though on the other hand the question of vesting is not affected by a direction merely referring to the period of possession. *Russell v. Buchanan*, 2 Cr. & M. 561 ; 7 Sim. 628 ; *Montgomerie v. Woodley*, 5 Ves. 522 ; *Shrimpton v. Shrimpton*, 31 B. 425.

Cases in which a devise to A. at or when or if he attain 21 is vested.
Prior devise till A. attain 21.

A devise to A., at or when or if he attain twenty-one will be vested :

1. If an estate is given prior to the attainment of twenty-one by the ultimate devisee to some third person either for the benefit of the devisee himself, or for the benefit of some other persons to endure during the minority. *Goodtitle d. Hayward v. Whitby*, 1 Burr. 228 ; *Re Mottram*, 10 Jur. N. S. 915 ; *Boraston's Case*, 8 Rep. 19a ; *Manfield v. Dugard*, 1 Eq. Ab. 195, pl. 4.

In this case the estate given to the devisee on attaining twenty-one is in fact a vested interest subject to a term.

Prior devise for life.

2. A devise to A. for life, and *from and after* his decease to B., if he attains twenty-one years will not without more give B. a vested interest. *In re Jobson* ; *Jobson v. Richardson*, 44 Ch. D. 154.

Effect of gift over.

3. A devise to A. for life, and from and after his death to his eldest son if he attains twenty-one, and in default of A.'s having a son over, may give the eldest son a vested estate. *Andrew v. Andrew*, 1 Ch. D. 410.

Gift over upon death under 21.

4. If there is a gift over upon death under twenty-one, the gift over shows that the first devisee is to take whatever interest the person claiming under the devise over is not entitled to, that is to say, the immediate interest. *Bromfield v. Crowder*, 1 B. & P. N. R. 313 ; see 14 East, 604 ; *Doe d. Roake v. Newell*, 1 Mau. & S. 327 ; 5 Dow, 202 ; *Edwards v. Hammond*, 3 Lev. 132 ; *Doe d. Hunt v. Moore*, 14 East, 601 ; *Phipps v. Ackers*, 3 Cl. & Fin. 691 ; 9 *ib.* 583 ; *Whitter v.*

Bremridge, L. R. 2 Eq. 736; see *L'Estrange v. L'Estrange*, Chap. XXXV 25 L. R. Ir. 399.

And the argument in favour of vesting is still stronger, if the gift over is upon death before the given time without issue. *Finch v. Lane*, 10 Eq. 501.

The attainment by the devisees of the given age is a certainty provided they live long enough; if, however, the contingency is some other event, as remainder to A. if he survives B., the estate is not vested till the event happens, notwithstanding the gift over. *Doe d. Planner v. Scudamore*, 2 B. & P. 289; *Price v. Hall*, 5 Eq. 399.

And of course the gift over can have no effect where there is an express direction as to the time of vesting. *Russell v. Buchanan*, 2 Cr. & Mee. 561; 7 Sim. 628.

5. There is, however, an important distinction between a devise to definite persons or to a class, which is clearly and satisfactorily ascertained at twenty-one, and a devise to such of a class as attain twenty-one, or to those who attain twenty-one. In the latter case "the finding or not finding the legatee depends on his attaining a particular qualification, and till the contingency happens, there is no one to whom the doctrine laid down in *Phipps v. Ackere*, can apply." Such a devise, therefore, will not be vested by a gift over. *Duffield v. Duffield*, 3 Bl. N. S. 260; *Stephen v. Stephen*, Ca. t. Talb. 228; *Festing v. Allen*, 12 M. & W. 279; *Holmes v. Prescott*, 10 Jur. N. S. 507; 33 L. J. Ch. 264; 11 L. T. N. S. 38; 12 W. R. 636; 3 N. R. 559; *Rhodes v. Whitehead*, 2 Dr. & Sm. 532; 13 W. R. 800; *Price v. Hall*, 5 Eq. 399; *Eddels' Trusts*, 11 Eq. 559; *Patching v. Barnett*, 28 W. R. 886. *Riley v. Garnett*, 3 De G. & S. 629, and *Browne v. Browne*, 3 Sm. & G. 568, will probably not be followed.

Devise to a contingent class and to a class upon a contingency.

But a devise to A. for life, and if he leave a son born or to be born in due time after his decease, who should live to attain twenty-one, then to such son in fee if he attain twenty-one, with a gift over if A. die without leaving a son who should attain twenty-one, has been held to give an infant son of A. a vested estate subject to be divested, because a son born within nine months of A.'s death could not then have attained twenty-

Chap. XXXV. one. *Muskett v. Eaton*, 1 Ch. D. 435 ; see, too, *Doe v. Hopkinson*, 5 Q. B. 228 ; *Sulley v. Barber*, 59 L. T. 824.

An estate to commence in certain events fails unless the events happen.

6. An estate limited to commence in certain specified events will fail altogether unless those exact events happen. Thus a gift, "if A. shall die, living my wife, without leaving a widow or any child, after his death and my wife's" to B., will fail if A. survives the testator's wife, though he may die without leaving a widow or child. *Holmes v. Cradock*, 3 Ves. 317 ; *Shuldham v. Smith*, 6 Dow, 22 ; *Dicken v. Clarke*, 2 Y. & C. Ex. 572.

So if a testator recites that he will be entitled to property in certain events, and disposes of it, if those events happen, the property passes only if those events happen, though in fact, he may be entitled to the property in other events as well. *Archbold v. Austin Gourlay*, 5 L. R. Ir. 214.

Where the contingency imports no more than the determination of prior interests the estate is vested.

But in the case of successive limitations "where there is a limitation over which, though expressed in the form of a contingent limitation, is in fact dependent on a condition essential to the determination of the interests previously limited, notwithstanding the words in form import contingency, they mean no more in fact than that the person to take under the limitation over is to take subject to the interests previously limited." *Maddison v. Chapman*, 4 K. & J. 709, 719 ; 3 De G. & J. 536 ; *Webb v. Hearing*, Cro. Jac. 415 ; *Pearsall v. Simpson*, 15 Ves. 29 ; *Franks v. Price*, 3 B. 182 ; 5 Bing. N. C. 37 ; 6 Sc. 710 ; *Chellen v. Martin*, 21 W. R. 671 ; *Edgeworth v. Edgeworth*, L. R. 4 H. L. 35 ; see *post*, p. 524.

Thus, if the devise is to A. for life, remainder to B. for life and on the decease of B., if A. be dead, to C. in fee, C. takes a vested remainder whether B. survives A. or not. Cases, *supra* ; see, too, *Key v. Key*, 4 D. M. & G. 73 ; *In re Betty Smith's Trusts*, L. R. 1 Eq. 79 ; *In re Martin* ; *Smith v. Martin*, 54 L. J. Ch. 1071 ; 53 L. T. 34.

So a devise in remainder to a person for his life, if he shall be living when the prior limitations determine, is not contingent, nor will subsequent remainders be contingent upon the survivorship of the tenant for life. *Leadbeater v. Cross*, 2 Q. B. D. 18.

Limits of the doctrine.

But to admit this construction, the limitation over must

involve no incident, but what is essential to the determination of the estates previously limited. *Maddison v. Chapman*, 4 K. & J. 709; 3 De G. & J. 536. Chap. XXXV.

7. A contingent interest is of course transmissible, and the death of the devisee before the event happens does not prevent the interest from vesting in him or his estate, if his being alive is not one of the conditions of the gift over taking effect. *In re Creswell*; *Parkin v. Creswell*, 24 Ch. D. 102. Contingent interest transmissible.

8. It is now settled, that when there is a gift to a person for life, if she so long remains unmarried, or for life until bankruptcy, followed by a gift over in the event of marriage or bankruptcy, the remainder is not contingent, but vested so as to take effect either upon the death or marriage or bankruptcy, as the case may be, of the tenant for life. *Luxford v. Cheeke*, 3 Lev. 125; *Lady Ann Fry's Case*, 1 Vent. 199; *Gordon v. Adolphus*, 3 B. P. C. 306; *Foster v. Lord Romney*, 11 East, 594; *Meeds v. Wood*, 19 B. 215; *Browne v. Hammond*, Jo. 210; *Eaton v. Hewitt*, 2 Dr. & S. 184; *Wardroper v. Cutfield*, 12 W. R. 458; *Walpole v. Laslett*, 7 L. T. N. S. 526; 1 N. R. 180; *Etches v. Etches*, 3 Dr. 440; *In re Cane*; *Ruff v. Sivers*, 60 L. J. Ch. 36; 63 L. T. 746. Estates to arise upon the determination of a prior life estate by marriage or bankruptcy take effect as vested remainders.

In *Pile v. Salter*, 5 Sim. 411, it was held, that the fact of the gift over being in the event of marriage to the tenant for life, together with others, would prevent this construction. This case, however, was not followed in *Underhill v. Roden*, 2 Ch. D. 494; *Scarborough v. Scarborough*, 58 L. T. 851. *Pile v. Salter*.

But this construction only applies where the ulterior limitation is a remainder, the event upon which it is to take effect being incorporated into the prior limitation for life, and not where the prior life estate is to be cut down in the event of the marriage of the tenant for life. *Sheffield v. Lord Orrery*, 3 Atk. 282.

If a sum is given to a legatee with a direction, that the interest shall be for her separate use for life and while she continues unmarried, with a gift over if she marries, the gift over only takes effect in that event. *M'Culloch v. M'Culloch*, 10 W. R. 515; 3 Giff. 606.

Under a devise to a wife for life provided she remains a

Chap. XXXV. widow, but in case she marries again to A. when he attains twenty-three, the wife was held entitled till A. attained twenty-three, though she married again. *Doe v. Freeman*, 1 T. R. 389. See *Re Cabburn*; *Gage v. Rutland*, 46 L. T. 848.

Gift till marriage followed by gift after death.

Similarly, where there is a gift for life or until marriage, followed by a gift over on death, the gift over takes effect on the marriage of the tenant for life. *Stanford v. Stanford*, 34 Ch. D. 362; *In re Dear*; *Helby v. Dear*, 58 L. J. Ch. 659; 61 L. T. 432; 38 W. R. 31; *In re Akeroyd's Settlement*; *Roberts v. Akeroyd*, (1893) 3 Ch. 368. *Re Wyatt*; *Gowan v. Wyatt*, 60 L. T. 920, must be considered overruled.

Limits of doctrine.

This doctrine does not apply to a case where a residue is given to the testator's widow for life or until marriage, and an annuity is given to her if she marries again, and legacies are directed to be paid on her death. In such a case the legacies are not raisable on A.'s marriage. *In re Tredwell*; *Jeffrey v. Tredwell*, (1891) 2 Ch. 640.

VESTING OF CHARGES ON LAND.

Legacies charged on land do not vest before they are payable.

The vesting of legacies charged upon real estate is governed by rules derived from the common law.

"If a sum of money be given to a person charged upon real estate, and that person, being an infant, is not to have the legacy immediately, but it is given at twenty-one or payable at twenty-one, if the child does not attain twenty-one the legacy is not raisable." *Parker v. Hodgson*, 1 Dr. & Sm. 568; see *Brown v. Wooler*, 2 Y. & C. C. 134.

Distinction between postponement of payment for the purposes of the estate and of the legatee.

But if the payment is postponed for purposes not referrible to the person of the legatee, but only for the convenience of the estate, as, for instance, in the case of a life tenancy, the legacies vest before the time of payment. *Evans v. Scott*, 1 H. L. 57; *King v. Withers*, Ca. t. Talb. 116; see *In re Brabazon*, 13 Ir. Eq. 156; *In re Neary's Estate*, 7 L. R. Ir. 311.

It makes no difference, whether the legacies subject to a life interest are made payable at twenty-one or not, though it seems that they will not in any case vest before then. *Remnant*

v. Hood, 2 D. F. & J. 396; *Davies v. Huguenin*, 1 H. & M. Chap. XXXV. 730; *Haverty v. Curtis*, (1895) 8 I. R. 23.

And a legacy charged upon land and directed to be paid upon an event which may or may not happen, for instance, when the testator's eldest son should come into possession of a settled estate, will fail if the event does not happen. *Taylor v. Lambert*, 2 Ch. D. 177.

Legacy payable upon an event which may never happen is contingent.

If a legacy is charged upon real and personal estate, the personal estate is the primary fund for payment, and, so far as the personal estate extends, the vesting is governed by the rules applicable to personal estate, but, so far as the legacy is payable out of realty, the rules with regard to legacies charged upon land apply. *Duke of Chandos v. Talbot*, 2 P. W. 601, 612; *Prowse v. Abingdon*, 1 Atk. 481; *In re Hudsons*, Dru. t. Sugd. 6.

Legacy charged upon real and personal estate follows proportionally the rules applicable to realty and personalty.

In the case of a power, if the donee is authorized to fix the times at which portions are to vest, he can direct a portion to vest at once, and it will in that case be raisable though the child dies under twenty-one. *Henty v. Wrey*, 21 Ch. D. 332, where the subject of the vesting of portions is fully discussed.

VESTING OF BEQUESTS OF PERSONALTY.

The vesting of bequests of personalty, including chattels real, is governed by rules derived from the civil law. These rules apply also to realty directed to be converted. *In re Hudsons*, Dru. t. Sugd. 6; *Hart's Trusts*, 3 De G. & J. 195.

Vesting of personalty is governed by the civil law.

I. When there is an express direction as to the period of vesting:

Meaning of "vest."

It has been said that the word "vest," being derived from "vestire," naturally refers to vesting in possession, and not to vesting in interest. *Young v. Robertson*, 4 Macq. 314. This is, however, contrary to the whole current of English authority, according to which the word "vest" has always been held to refer *prima facie* to vesting in interest or transmissibility, and not vesting in possession or indefeasibility.

Thus, when there is a direction that the gifts are to be vested at a certain period, the legatee will take no interest till then.

Direction as to vesting is imperative.

Chap. XXXV.

Gift over upon death before the time of vesting will not alter the meaning of the word vest.

When "vested" means "payable."

Gift over upon death without issue before the time of vesting.

Shares treated as vested before the time appointed.

Vested and paid used interchangeably.

Direction to pay legacies at a certain time.

Gift to children who survive the

Where the interests of legatees are to be vested at twenty-one, a gift over upon death under twenty-one, or upon death before the time of vesting, will not affect the natural meaning of the word. *Glanvill v. Glanvill*, 2 Mer. 38; *Comport v. Austen*, 12 Sim. 218; *Griffith v. Blunt*, 4 B. 248; *Rowland v. Tawney*, 26 B. 67; *Re Thatcher's Trust*, *ib.* 365; *Selby v. Whitaker*, 6 Ch. D. 239; see *Creeth v. Wilson*, 9 L. R. Ir. 216.

In many cases, however, "vested" has been used as equivalent to indefeasible or payable.

Thus, if the shares of members of a class are directed to be vested at a certain time, and there is a gift over to the other members of the class of the shares of those dying before that time without issue, vested will mean payable. *Taylor v. Frobisher*, 5 De G. & S. 191.

So, too, if legatees are treated as taking vested shares before the time fixed for vesting, vested must mean payable.

This will be the case, if a time is appointed for vesting, and maintenance is given, if any child entitled on the death of the tenant for life to a vested or presumptive share should be under the age appointed for vesting, where the word presumptive refers to the possibility of accruer. *Berkeley v. Swinburne*, 16 Sim. 275; *Baxter's Trust*, 4 N. R. 131; 10 Jur. N. S. 485.

Similarly, if in the event of any child dying before the time of vesting, leaving children, there is a gift of the share such child would have had if living to his issue, the direction as to vesting will be referred to payment. *In re Edmondson's Estate*, 5 Eq. 389; *Poole v. Bott*, 11 Ha. 33.

Or again, it may appear that the testator has used the terms vested and paid interchangeably. *In re Edmondson's Estate*, *supra*; *Williams v. Haythorne*, 6 Ch. 782; *Re Parr's Trust*, 41 L. J. Ch. 170.

And when there is a direction to pay legacies at the death of the tenant for life, a subsequent direction as to vesting at twenty-one will be referred to indefeasible vesting or possession. *Barnet v. Barnet*, 29 B. 239; *Simpson v. Peach*, 16 Eq. 209.

When there is a gift to children who survive their parent, a direction as to vesting will not make the gift vest in any who do

not survive their parent. *In re Payne*, 25 B. 556; *Williams v. Haythorne*, 6 Ch. 782; see *Draycott v. Wood*, 5 W. R. 158. Chap. XXXV.

If, however, the proviso as to vesting is intended to introduce a new gift, evidenced by the fact, for instance, that it applies to prior legatees who die leaving issue, and not merely to such of them as survive the tenant for life, it will override the previous contingency of surviving the tenants for life. *Williams v. Russell*, 10 Jur. N. S. 168. parent with a direction as to vesting.

A direction that legatees are to be beneficially interested at a certain period, refers only to vesting in possession. *M'Lachlan v. Taitt*, 28 B. 407; 2 D. F. & J. 449. Beneficial interest.

II. Where there is no direction as to vesting :

1. It is important to distinguish a gift to a contingent class, and a gift to a class upon a contingency; thus, a gift to children who attain twenty-one, or to such children as attain twenty-one, is a gift to a contingent class, and will only vest in those who attain twenty-one, though there may be a gift of interest or other circumstances, which in a gift to a class upon a contingency, as, for instance, at twenty-one, might have the effect of vesting the bequest. *Bull v. Pritchard*, 1 Russ. 213; *Bree v. Perfect*, 1 Coll. 128; *Leake v. Robinson*, 2 Mer. 363; *Stead v. Platt*, 18 B. 50; *Lloyd v. Lloyd*, 3 K. & J. 20; *Thomas v. Wilberforce*, 31 B. 299; *Williams v. Haythorne*, 6 Ch. 782; *Dewar v. Brooke*, 14 Ch. D. 529; see *Re Bulley's Estate*, 11 Jur. N. S. 791, 847; *Gotch v. Foster*, 5 Eq. 311. Gift to a class who attain 21, and to a class at 21.

If the gift is to children who attain twenty-one, and, if but one child, to such child, the contingency of attaining twenty-one will not be imported into the gift to a single child, unless it is apparent from the gift over, for instance, by a gift over "if no child shall live to attain a vested interest," or otherwise that no child was intended to take a vested interest at birth. *Walker v. Mower*, 16 B. 365; *Johnson v. Foulds*, 5 Eq. 268; *Re Fletcher*; *Doré v. Fletcher*, 53 L. T. 813. Contingency not imported into the gift to a single child.

2. When there is a clear gift, an additional direction to pay, when the legatee attains a given age, will not postpone the vesting, the gift being considered *debitum in presenti, solvendum in futuro*. Direction as to payment will not postpone vesting when there is a clear gift.

Thus, a gift to A, payable at twenty-one is vested, and it

Chap. XXXV. makes no difference whether the gift precedes or follows the direction for payment, provided a clear immediate gift can be found in the will. *In re Bartholomew*, 1 Mac. & G. 354; *Shrimpton v. Shrimpton*, 31 B. 425; *Maher v. Maher*, 1 L. R. Ir. 22.

Where the only gift is in the direction to pay, nothing vests till then.

The difficulty in these cases is to decide whether there is a substantive gift and a direction to pay, or whether the only gift is in the direction to pay. See *Shum v. Hobbs*, 3 Dr. 93; *Chaffers v. Abell*, 3 Jur. 577; *Williams v. Clark*, 4 De G. & S. 472; *Merry v. Hill*, 8 Eq. 619; see *In re Jobson*; *Jobson v. Richardson*, 44 Ch. D. 154.

Direction to accumulate interest till 21 will not affect a gift already vested.

Of course, when there is a clear gift, a direction to accumulate the interest and to pay the principal and accumulations at twenty-one will not affect the vesting. *Stretch v. Watkins*, 1 Mad. 253; *Blease v. Burgh*, 2 B. 226; *Breedon v. Tugman*, 3 M. & K. 289.

In doubtful cases the contingency may be reflected back and *vice versa*.

In doubtful cases the construction may be assisted by reference to other limitations; thus, where there was a gift for the children of a tenant for life, to be paid upon their attaining twenty-five, and if but one child, the whole to become the property of such only child, upon his attaining twenty-five, and be transmissible to his heirs, executors, or administrators, none of the children took vested interests before twenty-five, the gift, in the event of there being an only child, being clearly contingent. *Judd v. Judd*, 3 Sim. 525; see *Hunter v. Judd*, 4 Sim. 455; *Merry v. Hill*, 8 Eq. 619.

Similarly, if the interest of an only child is clearly vested, this may show that a gift to all the children at twenty-one was meant to be vested too. *King v. Isaacson*, 1 Sm. & G. 371.

Paid may mean vested.

And it may appear from the context that the words "to be paid" were meant to refer to vesting and not to payment. *Martineau v. Rogers*, 8 D. M. & G. 328.

Gift to be paid at a time which may never come in the legatee's life is contingent.

3. The time when the legacy is to be paid must, however, be certain; that is to say, it must be certain that the time will come if the legatee lives long enough. No doubt it is uncertain whether a legatee will ever attain a given age, but since he must attain it if he lives, this latter contingency is disregarded.

"When the time annexed to the payment is merely eventual, Chap. XXXV. and may or may not come, and the person dies before the contingency happens, I can find no instance in this Court where it has been held that the legacy at all events should be paid." It becomes, in fact, a legacy upon condition, for *dies incertus conditionem in testamento facit*. Thus, a legacy to A. to be paid upon marriage is contingent. *Atkins v. Hiccocks*, 1 Atk. 500; *Ellis v. Ellis*, 1 Sch. & L. 1; *Morgan v. Morgan*, 4 De G. & S. 164; *In re Cantillon's Minors*, 16 Ir. Ch. 301; *Corr v. Corr*, 1 R. 7 Eq. 397; *Malcolm v. O'Callaghan*, 2 Mad. 349; *Taylor v. Lambert*, 2 Ch. D. 177.

But if interest is given in the meantime, the legacy will be vested, though given upon marriage. *Booth v. Booth*, 4 Ves. 399; *Vize v. Stoney*, 1 D. & War. 337; *In re Wrey*; *Stuart v. Wrey*, 30 Ch. D. 507.

But a gift of interest in the meantime makes it vested.

It may be noticed, however, that a legacy given upon marriage may be held upon the context to be given at twenty-one, or upon marriage under twenty-one, as where there was a gift to parents for life, and then to their children if then of age or married, and if any were infants at the death of their parents, then to them at twenty-one, if sons, or on marriage if daughters. *Lang v. Pugh*, 1 Y. & C. C. 719; see *West v. West*, 4 Giff. 198.

Gift upon marriage construed as a gift at 21, or upon marriage under 21.

4. When the only gift is to be found in the direction to pay or divide:

a. If the postponement of division or payment is merely on account of the position of the property, if, for instance, there is a prior gift for life, or a bequest to trustees to pay debts, and a direction to pay upon the decease of the legatee for life, or after payment of the debts, the gift in remainder vests at once. *Bennett's Trust*, 3 K. & J. 280; *Strother v. Dutton*, 1 De G. & J. 675.

Direction to pay after a life interest vests at once.

b. But where the payment is deferred for reasons personal to the legatee, the gift will not vest till the appointed time.

Direction to pay at 21 will not vest till then.

Thus, a gift to a person at, or if, or as and when he shall attain, or upon attaining, or from and after attaining twenty-one, will not vest till the age is attained. *Hanson v. Graham*, 6 Ves. 239; *Locke v. Lamb*, 4 Eq. 372.

5. There are, however, several circumstances which may have

Chap. XXXV. the effect of vesting a gift contingent upon attaining a given age :

Contingent
gift becomes
vested by
severance.

a. If the subject of the gift is to be at once separated from the rest of the estate, and vested in trustees to be for the benefit of the legatee, though the interest may not be given in the meantime, but directed to accumulate and go with the capital. *Love v. L'Estrange*, 5 B. P. C. 59 ; *Saunders v. Vautier*, Cr. & Ph. 240 ; *Greet v. Greet*, 5 B. 123 ; *Branstrom v. Wilkinson*, 7 Ves. 420 ; *Lister v. Bradley*, 1 Ha. 10 ; *Ingram v. Suckling*, 7 W. R. 386 ; *In re Bevan's Trusts*, 34 Ch. D. 716 ; *Brennan v. Brennan*, (1894) 1 I. R. 69.

By gift of the
intermediate
interest.

b. If the interest upon the legacy, or upon the legatee's presumptive share, is given to the legatee in the meantime till the time of payment arrives. *Hanson v. Graham*, 6 Ves. 239 ; *Hart's Trusts*, 3 De G. & J. 195 ; *Hardcastle v. Hardcastle*, 1 H. & M. 405 ; *Bell v. Cade*, 2 J. & H. 122 ; *Bolding v. Strugnell*, 24 W. R. 339 ; 45 L. J. Ch. 208.

This rule applies in the case of deeds. *Mostyn v. Brunton*, 17 Ir. Ch. 153.

(i.) The rule applies though the interest may be given subject to charges or annuities. *Lane v. Goudge*, 9 Ves. 225 ; *Jones v. Mackilwain*, 1 Russ. 220 ; *Potts v. Atherton*, 28 L. J. Ch. 486.

(ii.) Though the interest may be expressed to be given for maintenance. *Hart's Trusts*, 3 De G. & J. 195 ; *In re Bunn* ; *Isaacson v. Webster*, 16 Ch. D. 47 ; *Scotney v. Lomer*, 29 Ch. D. 535 ; 31 Ch. D. 380 ; *Brennan v. Brennan*, *supra*.

(iii.) It makes no difference, whether the interest is first given up to a given time and then the principal, or *vice versa*, at any rate, if the age fixed is either twenty-one or some later age, but such as to indicate that the testator has fixed upon it only from the probable incapacity of the legatees to manage their property satisfactorily earlier. *Wadley v. North*, 3 Ves. 364 ; *Westwood v. Southey*, 2 Sim. N. S. 192 ; *Bird v. Maybury*, 33 B. 351 ; *Pearman v. Pearman*, 33 B. 394 ; *Pearson v. Dolman*, 3 Eq. 315 ; see *In re Wrey* ; *Stuart v. Wrey*, 30 Ch. D. 507.

It seems doubtful whether *Spencer v. Wilson*, 16 Eq. 501

is in harmony with the general current of authority, or even with the views expressed in *In re Peek's Trusts*, *ib.* 221, 225. Chap. XXXV.

On the other hand, if the interest is given up to a very advanced age, and the principal not till then, it is more doubtful whether the bequest would be vested. *Batsford v. Kebbell*, 3 Ves. 363; see *In re Bunn*; *Isaacson v. Webster*, 16 Ch. D. 47; *Scotney v. Lomer*, 29 Ch. D. 535; 31 Ch. D. 380; *In re Wrey*, *supra*.

c. It seems not to be quite clearly settled whether, where there is a discretion to trustees to apply the whole or part of the interest to the maintenance of the legatees, the bequest will be vested. The better opinion now seems to be that it will. *Eccles v. Birkett*, 4 De G. & S. 105; *Rouse's Estate*, 9 Ha. 649; *Fox v. Fox*, 19 Eq. 286; *Parrott v. Davies*, 38 L. T. N. S. 52; see, however, *Pulsford v. Hunter*, 3 B. C. C. 416; *Ashmore's Trusts*, 9 Eq. 99; *In re Grimshaw's Trusts*, 11 Ch. D. 406; *Wilson v. Knox*, 13 L. R. Ir. 349.

It has been suggested, that where the accumulated surplus would go to the same legatees as the interest and capital, the legacy is vested; but where the surplus income is either expressly given over, or would not follow the capital, it is not; so that a gift of residue in such a case would be vested, whereas a particular legacy would not. See *Pearson v. Dolman*, 3 Eq. 315. But *quære* whether this distinction reconciles the cases.

But a discretion either to apply the interest to maintenance or to accumulate it will not vest the legacies: *Vaudry v. Geddes*, 1 R. & M. 203; nor, perhaps, will a discretion to apply the whole or part of the interest, not exceeding a fixed sum, to maintenance: *Merry v. Hill*, 8 Eq. 619; nor will the gift of a fixed sum for maintenance, though it may be equivalent to the interest of the legacy: *Boughton v. Boughton*, 1 H. L. 406; *Watson v. Hayes*, 5 M. & Cr. 125; *Livesey v. Livesey*, 3 Russ. 287.

And the gift of a sum for maintenance out of the personal estate not exceeding the income of the legacies will have no effect upon vesting. *Wynch v. Wynch*, 1 Cox, 433; *Rudge v. Winnall*, 12 B. 357.

Effect of discretion to apply the whole or part of the interest.

Cases in which a gift of interest is not sufficient to vest contingent legacies.

Chap. XXXV.

A discretionary power given to trustees to apply the income for the benefit of the legatees, to the exclusion of any one or more of them, will not vest their shares. *In re Barnshaw's Trust*, 15 W. R. 378.

Effect of a gift of interest for a portion of the period before vesting.

d. Where interest is given only for a portion of the period before the time fixed for payment, if, for instance, legacies are given at twenty-six, with interest for maintenance during minority, it is doubtful whether the gift will be vested; probably it will not without more. See the remarks in *Pearson v. Dolman*, 3 Eq. 315. In *Davies v. Fisher*, 5 B. 201; *Harrison v. Grimwood*, 12 B. 192; *Tatham v. Vernon*, 29 B. 604, there were other circumstances. And see *Hunter's Trusts*, L. R. 1 Eq. 295.

It may be noticed, that minority properly means the period before the attainment of twenty-one; though, if there is an intention expressed to that effect, it may mean the whole period during which the testator has kept the legatee out of the property. *Milroy v. Milroy*, 14 Sim. 48; *Maddison v. Chapman*, 4 K. & J. 709; 3 De G. & J. 536; *Fraser v. Fraser*, 1 N. R. 430.

Gift of interest itself contingent.

e. Of course, where the interest is not given in the meantime, but is itself given at the same time as the principal, the gift does not vest. *Knight v. Knight*, 2 S. & St. 490; *Locke v. Lamb*, 4 Eq. 372.

Distinction between gift of interest upon a legacy to an individual and upon an aggregate fund given to a class.

f. A distinction must be drawn between the gift of a sum to each member of a class at twenty-one, with a gift of the interest upon the several shares in the meantime, and the gift of an aggregate fund to a class as they respectively attain twenty-one, with a direction that the whole interest is to be applied for their maintenance in the meantime; in the latter case, as the fund is to be kept together, and the whole interest applied for maintenance, nothing will vest before twenty-one. *Pulsford v. Hunter*, 3 B. C. C. 416; *Barker v. Lea*, T. & R. 413; *In re Ashmore's Trusts*, 9 Eq. 99; *In re Parker*; *Barker v. Barker*, 16 Ch. D. 44; *In re Morris*; *Salter v. A.-G.*, 33 W. R. 895; *Re Martin*; *Tuke v. Gilbert*, 57 L. T. 471; *In re Mervin*; *Mervin v. Crossman*, (1891) 3 Ch. 197; see *In re Byrne*, 23 L. R. Ir. 260; *In re Bevan's Trusts*, 34 Ch. D. 716. Perhaps

In re Grimshaw's Trusts, 11 Ch. D. 406, may be supported on Chap. XXXV. this ground.

g. It seems a gift of personalty to A. till B. attains twenty-one, and then to B., will not give B. a vested interest. *Sullivan v. Edgell*, 23 W. R. 722; though it will where there is anything to show that A. takes in trust for B. on the principle already stated, *ante*, p. 454. *Lane v. Goudge*, 9 Ves. 225.

Whether gift of personalty to A. till B. attains 21, and then to B., is vested.

h. An argument in favour of vesting has sometimes been based upon a power to make advances. *Vivian v. Mills*, 1 B. 315; *Harrison v. Grimwood*, 12 B. 192; *Powis v. Burdett*, 9 Ves. 428; *Walker v. Simpson*, 1 K. & J. 713; see *Malden v. Maine*, 2 Jur. N. S. 206.

Arguments in favour of vesting.

And the fact that the gift is residuary is also, it is said, in favour of vesting. *Booth v. Booth*, 4 Ves. 399; see *ante*, p. 465, and see *In re Wrey*, 30 Ch. D. 507, at p. 512.

6. Effect of a gift over upon vesting:

a. It seems a mere gift over upon death under twenty-one will not have the effect of vesting a prior gift contingent upon attaining twenty-one, though the point is doubtful. *Ridgway v. Ridgway*, 4 De G. & S. 271; *Davies v. Fisher*, 5 B. 201; in both which cases there were other circumstances which alone would have been sufficient to vest the gift; and see *per* Sir J. Leach in *Bland v. Williams*, 3 M. & K. 411. The remarks, however, of Sir John Leach seem to be based on the theory that a gift over under twenty-one, the prior gift being at twenty-one, shows that the prior gift was not meant to be vested. The truer doctrine appears to be, that a gift over upon death under twenty-one neither shows that the prior gift was meant to be contingent, nor has the effect of making it vested. See *Re Baxter's Trusts*, 4 N. R. 131; *Malcolm v. O'Callaghan*, 2 Mad. 349; *In re Payne*, 25 B. 556.

A mere gift over upon death before the time of vesting has no effect.

b. But where the gift is to a class at twenty-one, followed by a clause of accruer giving the interests of those dying under twenty-one to the other members of the class (a direction which would be useless if the shares are contingent till twenty-one), there is a strong argument in favour of vesting. *In re Edmondson's Estate*, 5 Eq. 389; see *In re Gunning's Estate*, 13 L. R. Ir. 203.

A clause of accruer is an argument for vesting.

Chap. XXXV.

Gift over upon death without issue.

Gift over upon death without issue before the time of vesting.

Effect of gift over upon death of the parent without issue upon contingent bequests to the children.

Gift to a class when the youngest attains 21.

Whether those dying under 21 are excluded.

c. It seems that a mere gift over upon the death of any of the legatees without issue will not vest contingent legacies. *Barker v. Lea*, T. & R. 413.

d. But a gift over upon death under twenty-one, and without issue, will vest a prior gift at twenty-one.

The testator seems to imply that the legacy is to go over not upon failure to attain that age, but only in the events mentioned, and the attainment of the given age is therefore not a condition precedent to vesting. *Harrison v. Grimwood*, 12 B. 192; *Bland v. Williams*, 3 M. & K. 411; *Murkin v. Phillipson*, *ib.* 257; *Thomson's Trusts*, 11 Eq. 146.

e. But if the gift is to A. for life, then to her children at twenty-one, and if A. dies without issue, or without leaving issue over, the gift over has no effect upon the vesting, since it may have been intended to provide for the death of all the children before the tenant for life. *Walker v. Mower*, 16 B. 365; *Wrangham's Trusts*, 1 Dr. & Sm. 358; *Kidman v. Kidman*, 40 L. J. Ch. 359; see *Wetherall v. Wetherall*, 1 D. J. & S. 134.

On the other hand, if the gift is to children living at the death of the tenant for life, as they attain twenty-one, a gift over on the death of the tenant for life without leaving issue will afford a strong argument in favour of vesting, since it is ineffectual if the children survive the parent and die under twenty-one. *Bree v. Perfect*, 1 Coll. 128; *In re Bevan's Trusts*, 34 Ch. D. 716.

7. When the gift is to a class when the youngest attains twenty-one, it is clear that all who attain twenty-one will take vested interests. *Leeming v. Sherratt*, 2 Ha. 14; *Parker v. Sowerby*, 1 Dr. 488; see 4 D. M. & G. 321; *Smith's Will*, 20 B. 197; see *Sansbury v. Read*, 12 Ves. 75; *Ford v. Rawlins*, 1 S. & St. 329; *In re Hunter's Trust*, L. R. 1 Eq. 295.

It has, however, been said, that those who die under twenty-one will not take vested interests: see the cases *supra cit.*; but in them the exact point does not appear to have arisen for decision, and to import the contingency of attaining twenty-one into the constitution of the class seems contrary to principle. See *Coldecott v. Best*, W. N. 1881, 150.

At any rate, in such a case, if the gift is not to a class, but to

individuals named, they take vested interests. *Cooper v. Cooper*, 29 B. 229; see *Re Lyman's Trust*, 2 L. T. N. S. 662. Chap. XXXV.

So, too, if the income is given to the class till the youngest attains twenty-one, and then the principal, they all take vested interests. *Grove's Trusts*, 3 Giff. 575; *Re Andrew*, 8 L. J. N. of C. 174; see *Boulton v. Pilcher*, 29 B. 633.

And if there is a clear gift to the class, a direction that it is to be divided when the youngest attains twenty-one will not postpone the vesting. *Knox v. Wells*, 2 H. & M. 674; see *Hilliard v. Fulford*, 28 L. T. N. S. 892; 42 L. J. Ch. 624; *Blasson v. Blasson*, 2 D. J. & S. 665.

III. Gifts to children contingent upon surviving their parents.

1. In many cases where a gift to children has been made contingent upon their surviving their parents, the Courts have laid hold of slight ambiguities to give them vested interests at birth. Most of the cases upon this subject have arisen on marriage settlements where there is a strong presumption of intention to provide for children generally, whereas gifts by will are mere bounty. *Farrer v. Barker*, 9 Ha. 743; but see *Jackson v. Dover*, 2 H. & M. 209.

It is, however, now clearly settled that in marriage settlements, as in wills, words of contingency must have their full force, and the Court will "lean" in favour of vesting only in cases of doubtful construction. *Whatford v. Moore*, 3 M. & Cr. 289; *Jeyes v. Savage*, 10 Ch. 555; see *In re Hamlet*; *Stephen v. Cunningham*, 39 Ch. D. 426. Words of contingency must have their full force in settlements as in wills.

Thus, a gift, after life interests to parents, to the children living at their decease, or if there are any children then living to such children, only goes to those who survive their parents; *à fortiori*, if provision is made for the issue of children who die before their parents leaving issue. *Jeyes v. Savage, supra*; *In re Deighton's Settled Estates*, 2 Ch. D. 783. Gifts to children living at their parents' death.

The fact that the word "such" is sometimes omitted in some of the limitations will not cause its rejection, if it occurs in the limitation under which the children take. *Whatford v. Moore*, 3 M. & Cr. 270; *Skipper v. King*, 12 B. 29; *Wilson v. Mount*, 19 B. 292. Force of the word "such."

Chap. XXXV.

t may be
rejected if
inaccurately
or inconsis-
tently used.

But, it would seem, it may be rejected, if it appears on the whole will that it is incorrectly used. *Howgrave v. Cartier*, 3 V. & B. 79; see *Rye v. Rye*, 1 L. R. Ir. 413; *Dowglass v. Waddell*, 17 L. R. Ir. 384.

And if the parent has power to pay over their shares to *such* children in his lifetime, the contingency of surviving the parent will be rejected, since the testator cannot have meant shares paid to children who die before their parents to be returned. *Powis v. Burdett*, 9 Ves. 428; *Walker v. Simpson*, 1 K. & J. 713.

Where the interest was given for the maintenance of such children as should be living at the parents' decease until they should attain twenty-one, followed by a gift to the children when they attained twenty-one, it was held that children who attained twenty-one took vested interests, though they predeceased their parents. *Bradley v. Barlow*, 5 Ha. 589.

Where a testatrix, after giving a power to appoint by will to issue, gave the property in default of appointment to such issue, it was held that the term "such issue" included all the issue, and not merely those who survived their parent. *In re Hutchinson*; *Alexander v. Jolley*, 55 L. J. Ch. 574; 54 L. T. 527.

Gift con-
tingent upon
surviving a
parent ex-
plained by
context.

2. And there may be sufficient evidence of intention to show that children dying before their parents were to take vested interests, though the original gift is contingent upon their surviving them.

Thus, if there is a direction that children are to take vested interests at twenty-one, or upon marriage, "though such respective times may happen before the parents' decease," the prior gift is controlled. *Dalton v. Hill*, 10 W. R. 396.

The same is the case, if the shares of the children are expressly referred to by the testator as payable in their parents' lifetime, and directed not to be paid till their deaths. *Jackson v. Dover*, 2 H. & M. 209.

But the mere fact, that the interests are to be vested at twenty-one, but not to be transferred till after the parents' death, will not give children dying before their parents vested interests, the word vested being read as equivalent to payable. *Williams v. Haythorne*, 6 Ch. 782.

But if the direction is that children, who attain twenty-one, or die under that leaving issue, are to take vested interests, the direction will control the contingency, and children who attain twenty-one and die before their parents will take vested interests. *Williams v. Russell*, 10 Jur. N. S. 168. Chap. XXXV.

3. So, too, children will take vested interests before their parents' death, if the property is given over in events which do not include the death of some of the children over twenty-one in their parents' lifetime, so that in that event the property would be undisposed of. *Perfect v. Lord Curzon*, 5 Mad. 442; *Torres v. Franco*, 1 R. & M. 649; *Swallow v. Binns*, 1 K. & J. 417; *Dixon v. Barkshire*, 34 B. 537; *In re Knowles*; *Nottage v. Buaton*, 21 Ch. D. 806. Gift to children who survive their parents may be vested by the effect of the gift over.

4. In cases, where there is a gift to a class of children, if any children survive their parents, it is clear, that unless some children survive the parents the gift never arises. *Hotchkin v. Humfrey*, 1 Mad. 65; *Fitzgerald v. Field*, 1 Russ. 430. Gift to a class upon a contingency.

But the contingency will not, without express words, be imported into the constitution of the class, so that if the contingency happens all members of the class will take whether they survive the contingency or not; thus, if there is a gift to A. for life, and then if he die leaving a child, to his children as tenants in common, and one child survives A., all his children, whether they survive him or not, will take. *Boulton v. Beard*, 3 D. M. & G. 608; *M'Lachlan v. Taitt*, 28 B. 407; 2 D. F. & J. 449; *Re Gratwicke*, 35 B. 315; *Re Orlebar's Settlement*, 20 Eq. 711; *Goddard's Trusts*, 1 R. 5 Eq. 14; see *Blasson v. Blasson*, 2 D. J. & S. 665; *Taylor v. Graham*, 3 App. C. 1287. The contingency is not to be imported into the constitution of the class.

Similarly, powers of raising different sums according to the number of children a man may have, will not be limited to mean the number of children capable of taking. *Knapp v. Knapp*, 12 Eq. 238; *In re Verschoyle's Trusts*, 3 L. R. Ir. 43; see *Rye v. Rye*, 1 L. R. Ir. 413.

But if the gift is to the children of A. if he leaves any him surviving, and there is a gift over if A. leaves no children him surviving, it would seem only children surviving A. would take. *Winn v. Fenwick*, 11 B. 438; *Wilson v. Mount*, 2 W. R. 448; Effect of gift over if no one of the class survive the contingency.

Chap. XXXV. 19 B. 292 ; *Stevens v. Pile*, 30 B. 284 ; *Stolworthy v. Sancroft*, 12 W. R. 635.

The word "such" will not be supplied so as to make a gift contingent.

Of course, if the gift is in the event of there being any children surviving at a particular time to "such" children, only those who survive the contingency can take, but the Court will not supply the word "such" if it does not occur in the limitation under which the children take, so as to cut down the class, though the omission may be accidental. *Woodcock v. Duke of Dorset*, 3 B. C. C. 569, corrected in 3 V. & B. 83 ; *King v. Hake*, 9 Ves. 439 ; *Stolworthy v. Sancroft*, 12 W. R. 635.

Contingency reflected back.

If there is a gift in remainder or upon a contingency to a class, which would give the members of the class vested interests immediately, or upon the happening of the contingency, and there is a direction that if there be but one child living at the period of distribution, or when the contingency happens, the whole is to go to that child, the contingency of being then living has in several cases been reflected back into the constitution of the original class. *Smith v. Vaughan*, 8 Vin. Ab. 381, tit. Devise (Z. c.), pl. 32 ; *Spencer v. Bullock*, 2 Ves. Jun. 687 ; *Madden v. Ikin*, 2 Dr. & S. 207 ; *Lewis v. Templer*, 33 B. 625 ; *Cooper v. Macdonald*, 16 Eq. 258.

The point cannot, however, be said to be settled beyond dispute in the face of *Kimberley v. Tew*, 4 D. & War. 139.

To what the word "then" refers.

5. When there is a gift after prior interests to persons "then living," the word then refers most naturally to the last antecedent ; thus, in the case of a gift to A. for life, remainder to B. for life, remainder to a class "then living," the word then refers to B.'s death, whether he dies before A. or not. *Archer v. Jigon*, 8 Sim. 446 ; *Wollaston's Settlement*, 27 B. 642 ; *Powis v. Matthews*, 11 W. R. 662 ; *Olney v. Bates*, 3 Dr. 319 ; *Heasman v. Pearse*, 7 Ch. 660 ; *Re Milne* ; *Grant v. Heysham*, 56 L. T. 852 ; 57 L. T. 828 ; *Palmer v. Orpen*, (1894) 1 I. R. 32.

On the other hand, if the object of the testator is not to limit successive interests, but to provide for personal enjoyment by the legatees by substituting for persons dying before the period of enjoyment a class of persons then living, the word then refers most naturally to the period of enjoyment. *Harvey v. Harvey*, 3 Jur. 949 ; *Hetherington v. Oakman*, 2 Y. & C. C.

299; *Gill v. Barrett*, 29 B. 373; see, too, *Heasman v. Pearse*, Chap. XXXV. 7 Ch. 275.

It may be noticed that in a gift to several persons nominatim and their children then living, the contingency of being then living will not be applied to the parents as well as the children, unless there is something to show that parents and children were to form one homogeneous class. *Burrell v. Baskerfield*, 11 B. 255; *Cormack v. Copous*, 17 B. 397; *Turner v. Hudson*, 10 B. 222.

In a marriage settlement where lands were limited, after a life interest, to "all and every or any one or more child or children, or any grandchild or grandchildren or other issue then in being of the said intended marriage" as the settlor should appoint, it was held that then only referred to the grandchildren. *Leader v. Duffey*, 17 L. R. Ir. 279; 13 App. C. 294.

For cases in which the words "then living" may be construed as referring to the stirpes, see *Cooper v. Macdonald*, 16 Eq. 258; and see Survivors.

Construction of the words "then living."

IV. Vesting of interests under powers of appointment.

Where there is a gift to certain persons as A. shall appoint, or a power to appoint certain property, and a gift in default of appointment, the persons to take in default of appointment take vested interests at the testator's death, subject to be divested by the exercise of the power. *Doe d. Willis v. Martin*, 4 T. R. 39; *Fearne*, C. R. 225; *In re Ware*; *Cumberlege v. Cumberlege-Ware*, 45 Ch. D. 269.

From what time persons taking under a power take vested interests.

Thus, a gift to children as A. shall by will appoint vests in all the children, but an appointment of the whole in favour of an only surviving child is good. *Woodcock v. Renneck*, 4 B. 190; 1 Ph. 72.

If, however, the power is exercised in favour of the same persons as would have taken in default of appointment, a question arises, whether the appointees are to be considered as taking under the original will or under the power.

It seems clear, that where the will authorises an appointment among persons, who would not all take in default of appointment, the appointees take under the exercise of the power. *Lee v. Olding*, 25 L. J. Ch. 580; 2 Jur. N. S. 850; *Vizard's*

Chap. XXXV. *Trusts*, L. R. 1 Ch. 588; *Sweetapple v. Horlock*, 48 L. J. Ch. 660; 11 Ch. D. 745.

Even if the power is merely distributive, so that the persons to take under the appointment and in default are the same, they take, nevertheless, under the exercise of the power, and not under the instrument creating it. *De Serre v. Clarke*, 18 Eq. 587.

Where a person on his marriage covenants to settle a share to which he is entitled in default of appointment, and the donee of the power subsequently appoints to him, the covenant is not void under section 91 of the Bankruptcy Act, 1869, as relating to property in which the bankrupt had no interest at the date of his marriage. *Re Andrews' Trusts*, 7 Ch. D. 635.

CHAPTER XXXVI.

PERPETUITY AND ACCUMULATION.

A TESTATOR cannot direct his property not to be used at all for a certain time ; for instance, he cannot direct his house to be bricked up for twenty years. In such a case there is an intestacy during the twenty years. *Brown v. Burdett*, 21 Ch. D. 667.

Chap.
XXXVI.

Direction to
brick up
house.

A gift for the maintenance of horses and dogs living at the testator's death is not void for remoteness. *In re Dean; Cooper-Dean v. Stevens*, 41 Ch. D. 552.

Gift for
maintenance
of animals.

A limitation by way of executory devise is void as too remote, if it is not to take effect until after the determination of one or more lives in being and upon the expiration of twenty-one years afterwards, as a term in gross and without reference to the infancy of any person who is to take under such limitation, or of any other person, allowance for gestation being made only in those cases where it actually exists. *Cadell v. Palmer*, 1 Cl. & F. 372.

Rule against
remoteness
stated.

The fact that the executory interest is given to an ascertained person so that he and the present owner of the estate can together make a good title within the limits of perpetuity does not make the executory interest valid if the event upon which it is to take effect is too remote.

Thus, a covenant in a conveyance of land to reconvey in certain events not limited in time or an unlimited right of re-entry is void for remoteness. *London and South Western Railway v. Gomm*, 20 Ch. D. 562 ; *Dunn v. Flood*, 25 Ch. D. 629 ; 28 Ch. D. 586 ; *Mackenzie v. Childers*, 43 Ch. D. at p. 279, overruling *Birmingham Canal Company v.*

**Chap.
XXXVI.**

How far the
rule applies
to charities.

Cartwright, 11 Ch. D. 421. See *In re Adams*, 24 Ch. D. 199 ; 27 Ch. D. 394.

Property cannot be given to a charity on an event which is too remote. *Company of Pewterers v. Governors of Christ's Hospital*, 1 Vern. 161.

But property which has been given to one charity can be given over to another on a remote event. *Christ's Hospital v. Grainger*, 16 Sim. 83 ; 1 Mac. & G. 460 ; *In re Tyler* ; *Tyler v. Tyler*, (1891) 3 Ch. 252.

And property can be given to a charity for a limited, though uncertain, period, the undisposed-of interest forming part of the testator's estate. *Walsh v. Secretary of State for India*, 10 H. L. 367 ; *In re Randell* ; *Randell v. Dixon*, 38 Ch. D. 213.

But where property has been given absolutely to a charity, a testator cannot add a proviso for cesser on an event which may be too remote. *In re Bowen* ; *Lloyd Phillips v. Davis*, (1893) 2 Ch. 491.

Gift of English
leaseholds.

A gift by a foreign will of leaseholds in England is governed by the rules of English law relating to perpetuity and accumulation. *Freke v. Lord Carbery*, 16 Eq. 461.

Direction to
buy land in
foreign
country to be
settled on
remote uses.

A direction to lay out money in the purchase of land in Scotland, to be settled to uses which are good according to Scotch law, but would be void for remoteness in England, is valid. *Fordyce v. Bridges*, 2 Ph. 497, 515.

To what rules
legal re-
mainders are
subject.

It has been decided (after much conflict of opinion) that legal remainders are subject to the rule against perpetuities. *In re Frost* ; *Frost v. Frost*, 43 Ch. D. 246.

Legal
remainder to
unborn son of
unborn person
void.

They are also controlled by an analogous doctrine, that no estate by way of remainder can be limited to the unborn child of an unborn person, whether such estate is expressly limited to take effect within the limits of perpetuity or not ; so that, for instance, in a limitation to A. an unmarried person for life, remainder to his first son for life, remainder to the first son of the first son of A., born in A.'s life, or within twenty-one years afterwards, in fee, the ultimate remainder in fee would be bad, though clearly within the limits of perpetuity. 2 Rep. 51a. ; 10 Rep. 50b. ; *Monypenny v. Dering*, 2 D. M. & G. 145 ; *Whitby v. Mitchell*, 42 Ch. D. 494 ; 44 Ch. D. 85.

In applying the rule against perpetuities, the state of things existing at the testator's death, and not at the date of the will, is to be looked at. *Vanderplank v. King*, 3 Ha. 17; *Cattlin v. Brown*, 11 Ha. 382; *Peard v. Kekewich*, 15 B. 173.

Chap.
XXXVI.

The rule is to be applied to the state of things existing at the testator's death.

Possible not actual events are to be considered.

But possible and not actual events are to be considered, and, therefore, if at the testator's death a gift might possibly not have vested within the proper time, it will not be good, because, as a matter of fact, it did so vest. *Lord Dungannon v. Smith*, 12 Cl. & F. 546; see *In re Roberts*; *Repington v. Roberts-Gawen*, 19 Ch. D. 520; *Abbiss v. Burney*; *In re Finch*, 17 Ch. D. 211; *In re Harvey*; *Peek v. Savory*, 39 Ch. D. 289; *In re Wood*; *Tullett v. Colville*, (1894) 2 Ch. 310; 3 Ch. 381.

The fact that a woman is past the age of child-bearing at the date of the will, or death, is not to be considered, and the chance of such a woman having children is a possible event for the purposes of determining whether a gift is void for perpetuity or not. *Jee v. Audley*, 1 Cox, 324; *In re Sayer's Trusts*, 6 Eq. 319; *In re Dawson*; *Johnston v. Hill*, 39 Ch. D. 155; not following *Cooper v. Laroche*, 17 Ch. D. 368.

That a woman past child-bearing may have children is a possible event within the rule.

Any gift not being charitable, the object of which is to tie up property for an indefinite time, is void; as, for instance, a devise of land to the trustees of the Penzance Library, to hold to them and their successors for ever, for the maintenance and support of the library. *Carne v. Long*, 2 D. F. & J. 75; *Thomson v. Shakespear*, 1 D. F. & J. 399; *Yeap Cheah Neo v. Ong Cheng Neo*, L. R. 6 P. C. 381; *In re Clark's Trust*, 1 Ch. D. 497; *Re Dutton*, 4 Ex. D. 54; *In re Sheraton's Trusts*, W. N. 1884, 174; *Hoare v. Hoare*, 56 L. T. 147.

Gift tending to tie up property for an indefinite time is void.

So, too, a restriction upon alienation beyond lives in being and twenty-one years after, is bad. *Armitage v. Coates*, 35 B. 1; *In re Teague's Settlement*, 10 Eq. 564; *In re Cunynghame's Settlement*, 11 Eq. 324; *In re Michael's Trusts*, 46 L. J. Ch. 651.

It has been suggested that a restraint upon anticipation in the case of a married woman ought to be treated as an exception to the rule against perpetuity, as the object of the restraint is to preserve for the married woman the beneficial enjoyment of her property. *In re Ridley*; *Buckton v. Hay*, 11 Ch. D. 645.

Restraint upon anticipation.

Chap.
XXXVI.
Devise upon
remote event.

It is clear that a devise of property to a named person to take effect upon a remote event is void. See *Bankes v. Holme*, 1 Russ. 394 n. ; *Lewis v. Templer*, 33 B. 625 ; *Commissioners of Donations v. De Clifford*, 1 D. & War. 245, 254.

Where a lease for fifty-four years was bequeathed for life with remainders, followed by a direction upon the expiration of the lease to convey freeholds of the testator upon the same trusts, it was held that the direction was not void for perpetuity. *Wood v. Drew*, 33 B. 610.

Whether
limitations
subsequent to
an estate tail
can be too
remote.

No questions with regard to remoteness can arise on limitations subsequent to an estate tail, provided the subsequent limitations must take effect, either during the existence of the estate tail or at the moment of its determination. *Cole v. Sewell*, 4 D. & War. 1 ; 2 H. L. 186 ; *Doe d. Winter v. Perratt*, 9 Cl. & F. 606 ; *Heasman v. Pearce*, 7 Ch. 275.

The test is
that they
must be
barrable as
long as they
subsist.

The foundation of this rule is, that if the subsequent limitations are such, that they must take effect during the existence of the estate tail, or at the moment of its determination, or not at all, they are always barrable, and therefore do not tend to restrain the free disposal of property.

And the converse follows, that, if the subsequent limitations are not always barrable, they will be subject to the rules of remoteness. The rule is sometimes laid down absolutely, that no limitations after estates tail are too remote, but it can only be accepted with the qualification above laid down. Otherwise, by means of limitations of equitable remainders which do not fail by failure of the prior estates, and are not barrable after the estate tail has determined, property might possibly be tied up for an almost indefinite time.

There seems to be no express decision on the point, but the rule as above laid down is involved in the decision in *Lady Lanesborough v. Fox*, Ca. t. Talb. 262 ; *Tregonwell v. Sydenham*, 3 Dow, 194.

The trusts of
a term pre-
cedent to an
estate tail
may be void
for remote-
ness.

Where interests are precedent to estates tail, they are, of course, not barrable, and the ordinary rules of perpetuity apply. Therefore, where a term precedent to estates tail is limited to trustees, upon trusts which are too remote, the trusts are void.

Case v. Drosier, 2 Kee. 764; 5 M. & Cr. 246; *Cochrane v. Cochrane*, 11 L. R. Ir. 361.

Chap.
XXXVI.

And where the term is precedent this will be the case, even though the event in which the trusts are to be executed would become impossible if the subsequent estates tail were barred. *Sykes v. Sykes*, 13 Eq. 56.

Similarly, powers not strictly precedent to, but concurrent with, an estate tail, for instance, powers to accumulate during the minorities of any persons entitled under the limitations of the will, whether the accumulations are expressly carried over or not, or to enter and manage the property, are void. *Marshall v. Holloway*, 2 Sw. 432; *Lord Southampton v. Marquis of Hertford*, 2 V. & B. 54; *Browne v. Stoughton*, 14 Sim. 369; *Turvin v. Newcome*, 3 K. & J. 16; *Floyer v. Bankes*, 8 Eq. 114.

Concurrent
terms.

But a trust for accumulation for the purpose of paying off debts or incumbrances upon the estate of the testator is valid. *Lord Southampton v. Marquis of Hertford*, 2 V. & B. 54, 65; *Bateman v. Hotchkin*, 10 B. 426; *Briggs v. Earl of Oxford*, 1 D. M. & G. 363.

Trust for
accumulation
to pay debts
is good.

And a direction to accumulate a fund till it reaches a certain amount, and then to apply it for the benefit of certain named persons for their lives, and the life of the survivor, is not void for perpetuity, if the fund, whether it has reached the amount directed or not, is to be divided at the death of the survivor. *Oddie v. Brown*, 4 De G. & J. 179.

A direction to
accumulate
till a fund
reaches a
certain sum.

No doubt powers of sale and leasing would be void, if the testator clearly shows that he intended them to subsist, or to arise beyond the limits of perpetuity; see *Ware v. Polhill*, 11 Ves. 257; *Hale v. Pew*, 25 B. 335; *Goodier v. Johnson*, 18 Ch. D. 441, 446.

Power of sale
and leasing.

But powers of sale, whether collateral or subsequent, though given in general terms in a settlement containing limitations for life, with remainders in fee or in tail, with an ultimate remainder in fee, are good, because the power is spent as soon as the object of the settlement is at an end by the absolute interest vesting in possession. *Biddle v. Perkins*, 4 Sim. 135; *Nelson v. Callow*, 15 Sim. 353; *Waring v. Coventry*, 1 M. & K.

Chap.
XXXVI.

249; *Lantsbery v. Collier*, 2 K. & J. 709; *Taite v. Swinstead*, 26 B. 525; *In re Lord Sudeley and Baines & Co.*, (1894) 1 Ch. 334.

Trust for sale
may be void.

A trust for sale if it arises on a remote event is void, but the invalidity of the trust for sale will not destroy the rights of the persons to take the proceeds if they are ascertained within the proper limits. *In re Daveron*; *Bowen v. Churchill*, (1893) 3 Ch. 421; *Goodier v. Edmunds*, (1893) 3 Ch. 455; *In re Wood*; *Tullett v. Colville*, (1894) 2 Ch. 310; 3 Ch. 381.

Gift to persons
who must be
living at the
testator's
death and at
the time of
vesting can-
not be too
remote.

The vesting of property may be postponed for any length of time, provided it must ultimately vest, if at all, in persons born at the death of the testator, and living at the time of vesting, since in such a case it must vest absolutely within lives in being. *Lachlan v. Reynolds*, 9 Ha. 796.

But the gift is void for perpetuity, though it must vest in persons born within lives in being at the testator's death, and living when the event happens, if it may not so vest within lives in being and twenty-one years afterwards. *Jee v. Audley*, 1 Cox, 324; see *Garland v. Brown*, 10 L. T. N. S. 292; *In re Hargreaves*; *Midgley v. Tatley*, 43 Ch. D. 401; overruling *Avern v. Lloyd*, 5 Eq. 383; see, too, *Stuart v. Cockerell*, 7 Eq. 363.

Gift for life
to unborn
children of a
tenant for life
is good.

A limitation for life to the unborn children of a tenant for life, or to the descendants of two tenants for life, is good. *Avern v. Lloyd*, 5 Eq. 383; *Stuart v. Cockerell*, 7 Eq. 363; see 5 Ch. 713; *Hampton v. Holman*, 5 Ch. D. 183; *In re Roberts*; *Repington v. Roberts-Gawen*, 19 Ch. D. 520; overruling *Hayes v. Hayes*, 4 Russ. 311.

Cross limita-
tion between
unborn
tenants for
life.

There appears to be no doubt that cross limitations for life between unborn tenants for life would be valid, and, moreover that limitations for life to successive generations to come into being within the bounds of perpetuity are also valid. *Ashley v. Ashley*, 6 Sim. 358; *Cadell v. Palmer*, 1 Cl. & F. 372; see, however, *Stuart v. Cockerell*, 7 Eq. 363, p. 370.

Upon the same principle a limitation to the unborn children of a tenant for life, and the survivors and survivor of them, during the life of the longest liver has been sustained. *Gooch v. Gooch*, 14 B. 565; 3 D. M. & G. 366.

If, however, the limitation is not simply to the survivors of the tenants for life, but to the survivors if there is no issue of the tenant for life dying, and if there is issue, then to the issue, the limitations over are bad. *Gooch v. Gooch*, 14 B. 565; 3 D. M. & G. 366, 384.

Chap.
XXXVI.
Substitution
of issue.

A gift over of the life interest of an unborn tenant for life would be void for remoteness if the event on which the gift over was limited to take effect might by possibility be too remote. See *Hodgson v. Halford*, 11 Ch. D. 959.

Remote gift
over of life
interest.

After life interests to unborn persons, the absolute interest can be given to persons either living at the death of the testator or ascertained within the limits of perpetuity. *Evans v. Walker*, 3 Ch. D. 211; *In re Roberts*; *Repington v. Roberts-Gawen*, 19 Ch. D. 520.

Remainders
after life
interests of
unborn per-
sons.

But the absolute interest cannot be limited to a person who may not be ascertained within lives in being and twenty-one years afterwards. For instance, after life interests to unborn children, a limitation to the eldest grandchild living at the determination of the life estates, or a limitation to the survivor of the tenants for life, would be void. *Gooch v. Gooch*, 3 D. M. & G. 366; *Garland v. Brown*, 10 L. T. N. S. 292.

Limitations following upon limitations void for perpetuity are themselves void, whether within the line of perpetuity or not. *Proctor v. Bishop of Bath and Wells*, 2 H. Bl. 358; *Brudenell v. Elwes*, 1 East, 442; *Beard v. Westcott*, 5 Taunt. 393; 5 B. & Ald. 801; T. & R. 25; *Thatcher's Trust*, 26 B. 365.

Limitations
dependent on
void limita-
tions are
themselves
void.

But see, as to the limited application of this principle in the case of appointments under powers, *Williamson v. Farwell*, 35 Ch. D. 128.

Appoint-
ments under
powers.

And a limitation within the line of perpetuity is good though subject to be divested by the exercise of a power which is void for remoteness. *Re Abbott*; *Peacock v. Frigout*, (1893) 1 Ch. 54.

Where property is given over on a compound event, i.e. an event involving several contingencies, the gift over cannot be split up into as many gifts over as there are possible events, so as to sustain the gift over whenever the actual event falls within the limits of perpetuity. *Proctor v. Bishop of Bath and*

Splitting
compound
events.

Chap.
XXXVI.

Wells, 2 H. Bl. 358; *Lord Dungannon v. Smith*, 12 Cl. & F. 546; *Burley v. Evelyn*, 16 Sim. 290; *Monypenny v. Dering*, 2 D. M. & G. 145; *In re Harvey*; *Peek v. Savory*, 39 Ch. D. 289; *In re Bence*; *Smith v. Bence*, (1891) 3 Ch. 242.

But if the testator has himself separated the gift so as to make it take effect on the happening of any of several events, and the event which happens is not too remote, the gift over is good. *Longhead v. Phelps*, 2 W. Bl. 704; *Miles v. Harford*, 12 Ch. D. 691.

And if, although the testator has not himself separated the gift the gift can be so separated as to take effect in one event as a contingent remainder and in the other as an executory devise, and the event on which the remainder is limited occurs, the gift will be good. *Evers v. Challis*, 7 H. L. 531, explained in *In re Bence*; *Smith v. Bence*, (1891) 3 Ch. 242, doubting *Watson v. Young*, 28 Ch. D. 436.

Gift to a class to be ascertained beyond the limits of perpetuity is void.

Where there is a gift to a class, any members of which may have to be ascertained beyond the limits of perpetuity—for instance, to the children of a living person who shall attain twenty-five—the whole gift is void. *Leake v. Robinson*, 2 Mer. 363; *Boughton v. Boughton*, 1 H. L. 406; *Merlin v. Blagrove*, 25 B. 125; *Stuart v. Cockerell*, 7 Eq. 363; 5 Ch. 713; *Patching v. Barnett*, 49 L. J. Ch. 665; 51 *ib.* 74; *Blight v. Hartnoll*, 19 Ch. D. 294.

Similarly, where there is a gift after the death of an unborn tenant for life to the children and grandchildren of a living person, the gift is void for remoteness, the children and grandchildren being intended to form one class. *Stuart v. Cockerell*, 7 Eq. 363; 5 Ch. 713.

But if the remoter issue are to take substitutionally, the gift to the original class will be good, though the substitutional gifts may be void for remoteness. *Baldwin v. Rogers*, 3 D. M. & G. 649; *Packer v. Scott*, 33 B. 511; *Goodier v. Johnson*, 18 Ch. D. 441.

Whether a gift to an individual and a remote class is void.

The rule against perpetuity applies where the gift is to a remote class, and a named person as tenants in common, the shares not being ascertainable within the proper limits. *Porter*

v. *Fox*, 6 Sim. 485; *In re Mervin*; *Mervin v. Crossman*, (1891) 3 Ch. 197.

Chap.
XXXVI.

Perhaps, however, it would not apply to a similar gift in joint tenancy. 1 Jarman, 229.

If by the application of the rules for ascertaining the class the class must be finally ascertained within the limits of perpetuity, the gift is good. *Picken v. Matthews*, 10 Ch. D. 264; see *Re Whitten*; *King v. Whitten*, 62 L. T. 391.

Where particular sums are given to each of the members of a class, the gift is good as to those members who are within the limits of perpetuity. *Storrs v. Benbow*, 2 M. & K. 46; 3 D. M. & G. 390; *Wilkinson v. Duncan*, 30 B. 111.

Distinction between gift of a fund to a class and gift of a sum to each member of a class.

Cases where it is possible to sever valid and remote shares.

This principle has been extended to cases where, though the gift is in terms to a class, the effect of it is to give definite sums, ascertained at the determination of lives in being, to each of several classes, some of which are within and some without the line of perpetuity; for instance, if the gift is to A. for life, remainder to A.'s children for life, and the share of each child to go to his children, since the share of each of A.'s children is ascertained at A.'s death, the effect is to give a definite sum to each group of A.'s grandchildren, and the gift is good as regards those grandchildren whose parents were born in the testator's lifetime. *Griffith v. Pownall*, 13 Sim. 393; *Cattlin v. Brown*, 11 Ha. 372; *Knapping v. Tomlinson*, 12 W. R. 784; 10 Jur. N. S. 626.

And the principle is the same, where the gift is to A. for life, then to A.'s children living at his death, who should attain twenty-one, the share of each daughter to be settled on her for life, remainder to her children. In such a case the direction to settle was held good with regard to a child of A. *in esse* at the testator's death. *Wilson v. Wilson*, 4 Jur. N. S. 1076; 28 L. J. Ch. 95; *Herbert v. Webster*, 15 Ch. D. 610.

And, apparently, if the gift were directly to the grandchildren instead of through the direction to settle, the construction would be the same. *Greenwood v. Roberts*, 15 B. 92, which at first sight appears to decide the contrary, is explained by the M. R., in *Webster v. Boddington*, 26 B. 128, to have

Chap.
XXXVI.

been decided on a different principle. Whether the principle was rightly applied, *quære*.

But if the share given to grandchildren is contingent upon events, which may happen beyond the limits of perpetuity, and the share may never become vested, in which event the shares taken by the other *stirpes* would be increased, then the shares of each *stirps* would not be ascertainable within the proper limits, and the whole will fail; for instance, if the gift is to A. for life, then to the children of A., and the children of such children who attain twenty-one, the children to take a parent's share. *Webster v. Boddington*, 26 B. 128; *Seaman v. Wood*, 22 B. 591; *Smith v. Smith*, 5 Ch. 342; *Hale v. Hale*, 3 Ch. D. 643; *Bentinck v. Duke of Portland*, 7 Ch. D. 693; *Pearks v. Moseley*, 5 App. C. 714; see *Salmon v. Salmon*, 29 B. 27; *Re Whitten*; *King v. Whitten*, 62 L. T. 391; *In re Bence*; *Smith v. Bence*, (1891) 3 Ch. 242.

Gift to a person satisfying a particular description is void unless there must be some such person within the limits of perpetuity.

Where there is a gift to a person by some particular description, the gift will be void, unless it is clear that there must be some person answering the description within the limits of perpetuity. Thus, a trust to convey to such person as for the time being would take by descent as heir male of the body of the testator's grandson, when some such person should attain the age of twenty-one, is void. *Lord Dungannon v. Smith*, 12 Cl. & F. 546; *Ibbetson v. Ibbetson*, 10 Sim. 495; 5 M. & Cr. 26; *Wainman v. Field*, Kay, 507; *Patching v. Barnett*, 28 W. R. 886.

Effect of the words "as far as the rules of law and equity permit."

How far the words, "as far as the rules of law and equity permit," would restrain the gift to such persons as satisfy the description within the limits of perpetuity, seems not clearly settled.

Tollemache v. The Earl of Coventry.

Where there was a gift (after life interests to the testator's wife, Lady Vere, and her son, Lord Vere) to the person who should from time to time be Lord Vere, it being the testator's will that the goods should be held with the title of the family, as far as the rules of law and equity permit, and the testator left a son, Lord Vere, and two sons of the son living at his death, the gift was held to vest absolutely in the first grandson who became Lord Vere. *Tollemache v. Earl of Coventry*, 2

Cl. & F. 611; 8 Bl. N. S. 547. See 12 Cl. & F. 555, *note*; *In re Viscount Exmouth*; *Viscount Exmouth v. Praed*, 23 Ch. D. 158. See, too, *per* Lord St. Leonards, in *Ker v. Lord Dunnington*, 1 D. & War. 536; and see *Mackworth v. Hinxman*, 2 Kee. 658.

Chap.
XXXVI.

It seems, a trust of chattels for the person or persons who should, for the time being, be in actual possession of certain settled estates, to the end that such chattels may go along with the same estates, "so far as the rules of law or equity will permit," but so that they shall not vest in any person becoming entitled to the estates for an estate of inheritance, unless he attain twenty-one, would be good, though in the absence of those words it would be bad. *Harrington v. Harrington*, L. R. 5 H. L. 87.

On the effect of the words, "as far as the law allows," see *Pownall v. Graham*, 33 B. 242.

Where personality is given upon the trusts of real estate, which has been settled upon living persons for life, remainder to their sons in tail, and there is a direction that the personality is not to vest in any tenant in tail who dies under twenty-one, the clause is not void for remoteness, but refers only to tenants in tail by purchase, since none but tenants in tail by purchase can be said to take personality under the will, personality not being descendible. *Christie v. Gosling*, L. R. 1 H. L. 279; *Martelli v. Holloway*, L. R. 5 H. L. 532.

Direction that
personality is
not to vest in
a tenant in
tail dying
under 21.

In such a case, in the event of a tenant in tail by purchase dying under twenty-one, leaving issue, the realty and personality would become severed, since the realty would go to the issue, and the personality to the next tenant in tail by purchase. But if the disposition of the personal estate contains or involves any trust for a tenant in tail who takes real estate by descent, the term tenant in tail could not be limited to tenants in tail by purchase. See *per* Lord Westbury, 1 D. J. & S. 1; *Ibbetson v. Ibbetson*, 10 Sim. 495; 5 M. & Cr. 26; *Ferrand v. Wilson*, 4 Ha. 344.

A power, though authorising an appointment which would be void for perpetuity, is valid if the appointment is kept within the proper limits. *Slark v. Dakyns*, 10 Ch. 35.

Power exer-
cised within
the limits of
perpetuity
good.

Chap.
XXXVI.
General
powers.

As regards appointments under powers :

Where the power is a general power to appoint by deed or will, the appointees need only be capable of taking under the instrument exercising the power.

The same principle applies to a general power to appoint by will. *Rous v. Jackson*, 29 Ch. D. 521 ; *In re Flower* ; *Edmonds v. Edmonds*, 55 L. J. Ch. 200 ; 53 L. T. 717 ; 34 W. R. 149 ; *Stuart v. Babington*, 27 L. R. Ir. 551 ; not following *In re Powell's Trusts*, 39 L. J. Ch. 188.

Special
powers.

In the case of powers of appointment to particular classes of persons, the person to whom the appointment is made must be capable of taking under the instrument creating the power. *In re Powell's Trusts*, *supra*.

An appointment, under a power authorizing an appointment which would be void for perpetuity, is valid if itself kept within the proper limit. *Slark v. Dakyns*, 10 Ch. 35.

And the question whether an appointment is valid is determined by the state of things existing when the appointment takes effect. *Wilkinson v. Duncan*, 30 B. 111 ; *Von Brockdorff v. Malcolm*, 30 Ch. D. 172.

So, an appointment under a special power will be good if, at the time when the appointment takes effect, the persons to take under it are objects of the power. *In re Coulman* ; *Munby v. Ross*, 30 Ch. D. 186.

Where a marriage settlement gave a power to appoint to children of the marriage, an appointment to a son for life, with remainder to such persons as he should by will appoint, was held void as to the remainder. *Wollaston v. King*, 8 Eq. 165 ; *In re Brown & Sibly*, 3 Ch. D. 156 ; *Hodgson v. Halford*, 11 Ch. D. 959.

So a power in a settlement to appoint to children cannot be exercised by an appointment to take effect upon the marriage of an unmarried child. *Morgan v. Gronow*, 16 Eq. 1.

As to the principles applicable where the donee of a special power, after invalid limitations, adds a gift over in default of such limitations to objects of the power, see *Crompe v. Barrow*, 4 Ves. 681 ; *Webb v. Sadler*, 8 Ch. 419 ; *Williamson v. Farwell*, 35 Ch. D. 128 ; *In re Abbott* ; *Peacock v. Frigout*, (1893) 1 Ch. 54.

When a power is well executed, but a restraint upon anticipation is imposed upon the enjoyment, which is void for remoteness, the restraint will be rejected. *Fry v. Capper*, Kay, 163; *Teague's Settlement*, 10 Eq. 564; *Cunynghame's Settlement*, 11 Eq. 324; *Shute v. Hogge*, 58 L. T. 546; see *ante*, p. 477.

And when there is an absolute gift, subsequent qualifications of the gift which are void for remoteness will be rejected. *Carver v. Bowles*, 2 R. & M. 306; *Ring v. Hardwick*, 2 B. 352; *Cooke v. Cooke*, 38 Ch. D. 202; *Re Boyd*; *Nield v. Boyd*, 63 L. T. 92; *Dowglass v. Waddell*, 17 L. R. Ir. 384.

Chap.
XXXVI.

Invalid
restrictions
rejected.

THE CY PRÈS DOCTRINE.

In many cases limitations of real estate, in themselves void for perpetuity, have been made good by the application of the so-called doctrine of *cy près*.

This doctrine is a rule of construction, and applies not merely to executory trusts. *Monypenny v. Dering*, 16 M. & W. 418; *Parfitt v. Hember*, 4 Eq. 443; *Hampton v. Holman*, 5 Ch. D. 183.

Cy près
doctrine is a
rule of con-
struction.

It also applies to the execution of a power by will. *Line v. Hall*, 43 L. J. Ch. 107.

1. Where a testator has devised lands in a manner transgressing the limits of perpetuity, and the Court can, by giving estates tail to any of the devisees, carry the property in the precise course marked out by the testator, supposing the estates left to themselves, it will do so. *Humberston v. Humberston*, 1 P. W. 332; *Monypenny v. Dering*, 16 M. & W. 418; *Parfitt v. Hember*, 4 Eq. 443.

Parent will
take an estate
tail where the
effect will be
to give the
property in
the course
marked out
by the
testator.

Thus, a limitation to an unborn person for life, remainder to his children successively, in tail, will give the unborn person an estate tail; cases *supra*.

And the doctrine may be applied to some of a class, and not to others; as well as to a portion of the property included in a devise, and not to the rest. *Vanderplank v. King*, 3 Ha. 1; *Line v. Hall*, 22 W. R. 124; 43 L. J. Ch. 107.

Doctrine
applied to
some members
of a class and
to part of the
property de-
vised.

2. And where, by giving an estate tail to the parent, all the

The doctrine

Chap.
XXXVI.
applies
though the
children
meant to take
jointly in tail.

Limits of the
doctrine.

Whether it
applies where
the intention
is to create
life estates
for ever.

objects intended to be benefited by the testator would be included, this construction will be adopted, although the children were meant to take jointly in tail as purchasers. *Pitt v. Jackson*, 2 B. C. C. 51, cit. 2 Ves. Jun. 349; *Vanderplank v. King*, 3 Ha. 1; *Williams v. Teale*, 6 ib. 239.

3. The doctrine will, however, not be applied where the result would be to carry the estate to persons not intended to be benefited by the testator. *Monypenny v. Dering*, 16 M. & W. 418; 7 Ha. 568; 2 D. M. & G. 174.

4. It has sometimes been said that the *cy près* doctrine does not apply where the only intention is to create successive life estates for ever, but the point is not covered by authority. It is clear that the doctrine will not apply where the intention is only to create a limited number of life estates on the principle already stated. *Seaward v. Willock*, 5 East, 198.

Nor will it apply where successive terms of years, determinable on the death of the devisee, are given. *Somerville v. Lethbridge*, 6 T. R. 213; *Beard v. Westcott*, 5 B. & Ald. 81; T. & R. 25.

On the other hand, it is clear that where an estate tail is given by the force of the limitation itself, words indicating that the successive interests are to be for life will be rejected, whether the estate tail is given by direct words: *Doe d. Elton v. Stenlake*, 12 East, 515; *Reece v. Steel*, 2 Sim. 233; *Hugo v. Williams*, 14 Eq. 225; *Forsbrook v. Forsbrook*, 3 Ch. 93; or by the effect of a gift over in default of issue: *Mortimer v. West*, 2 Sim. 274; *Woollen v. Andrews*, 2 Bing. 126; *Brooke v. Turner*, 2 Bing. N. C. 422; *Parfitt v. Hember*, 4 Eq. 443.

On the whole, there seems to be no reason why the same construction should not apply where the testator attempts to create life estates for ever. See *per* Sir J. Rolt, in *Forsbrook v. Forsbrook*, 3 Ch. p. 99, and *Parfitt v. Hember*, 4 Eq. 443, where no stress was laid on the gift in default of issue. And on this ground only *Woollen v. Andrews* and *Mortimer v. West*, where the gift over was not on an indefinite failure of issue, can be held satisfactory. See *Hampton v. Holman*, 5 Ch. D. 183.

It does not

5. The *cy près* construction does not apply where the estates

are limited to children of unborn persons in fee. *Bristow v. Warde*, 2 Ves. Jun. 336; *Hale v. Pew*, 25 B. 335.

The doctrine does not apply to personalty nor to a mixed fund. *Routledge v. Dorril*, 2 Ves. Jun. 365; *Boughton v. James*, 1 Coll. 44; 1 H. L. 406.

Chap.
XXXVI.

apply where
the children
take in fee.
It does not
apply to per-
sonalty.

Where a parent having power to appoint to sons in tail appoints to them for life with remainders in tail, and puts them to their election between benefits given by the will and their rights in default of appointment, the doctrine of *cy près* has no application. *In re Denneby's Estate*, 17 Ir. Ch. 97.

ACCUMULATION.

A trust for accumulation beyond the limits of perpetuity is entirely void *ab initio*, whether before or since the Thellusson Act, and whether it be for a purpose excepted from the operation of the Act or not, unless it be for the payment of debts. *Curtis v. Lukin*, 5 B. 147; *Scarisbrick v. Skelmersdale*, 17 Sim. 187; *Smith v. Cuninghame*, 13 L. R. Ir. 480.

Trust for
accumulation
beyond the
limits of per-
petuity is void
in toto.

And by the Thellusson Act (39 & 40 Geo. III. c. 98) accumulation by will is restrained for any longer term than twenty-one years from the death of the testator, or during the minority or respective minorities of any person or persons who shall be living or *en ventre sa mère* at the death of the testator, or during the minority or respective minorities only of any person or persons who, under the trusts of the will, would for the time being, if of full age, be entitled to the rents and profits or the interest directed to be accumulated.

The Thel-
lusson Act.

By sect. 2 provisions for the payment of the debts of the devisor or other person or persons, and provisions for raising portions of the children of the devisor, or of any person taking any interest under the will, and directions touching the produce of timber or wood, are excepted from the Act.

By the Accumulations Act, 1892 (55 & 56 Vict. c. 58), accumulation by will for the purchase of land only is restricted to the minority or respective minorities of any person or persons who under the trusts of the will would for the time being, if of full

The Accumu-
lations Act,
1892.

Chap.
XXXVI.

The statute applies if property is so given as to involve accumulation.

age, be entitled to receive the rents, issues, profits, or income so directed to be accumulated.

An express direction to accumulate is not necessary to bring the property within the statute; it is enough if the property is given in such a manner that accumulation becomes necessary. *Tench v. Cheese*, 6 D. M. & G. 453; *Macdonald v. Bryce*, 2 Kee. 276; the decree in *Countess of Bective v. Hodgson*, 10 H. L. 656; *Wade Gery v. Handley*, 1 Ch. D. 653; 3 Ch. D. 374.

Accumulation by trustees of money to be laid out at once is not within the statute.

But when property is directed to be applied to certain purposes at once, but is accumulated owing to the neglect of trustees, or from some other reason, the statute does not apply. *Lombe v. Stoughton*, 12 Sim. 304; where the direction to accumulate was merely subsidiary to the general trusts. See *Phipps v. Kelynge*, 2 V. & B. 57.

Direction to keep up policies is not within the statute.

A direction to keep up policies effected by the testator in his lifetime on the lives of his children, the policies to be settled in case of marriage on their wives and children, is not a trust for accumulation within the statute. *Bassil v. Lester*, 9 Ha. 177; *In re Vaughan*; *Halford v. Close*, W. N. 1883, 89.

Repairs and improvements.

A trust to repair is not within the Act. *Vine v. Raleigh*, (1891) 2 Ch. 13; *In re Mason*; *Mason v. Mason*, (1891) 3 Ch. 467.

Nor is a trust to improve, provided the improvements be such as would properly be defrayed out of income. *Cases, supra*.

Testator may select any one period permitted by the statute for accumulation.

A testator may direct accumulation during any one, but not more, of the periods allowed by the statute. *Wilson v. Wilson*, 1 Sim. N. S. 288; *Jagger v. Jagger*, 25 Ch. D. 729.

Period of 21 years runs from the death.

The period of twenty-one years is to be calculated from the death of the testator, exclusive of the day of his death, and must be a period immediately following his death. *Webb v. Webb*, 2 B. 493; *Gorst v. Lowndes*, 11 Sim. 434; *Shaw v. Rhodes*, 1 M. & Cr. 154; *A.-G. v. Poulden*, 3 Ha. 555.

Period of the minority of any person.

The words of the statute permitting accumulation during the minority of any person who, under the trusts of the will, would, if of full age, be entitled to the rents and profits, do not permit accumulation during the period before the birth of such

person. *Haley v. Bannister*, 4 Mad. 275 ; *Ellis v. Maxwell*, 3 B. 596.

Chap.
XXXVI.

And it has been doubted, whether these words would authorise an accumulation during the minority of a person not born at the date of the death, but if not, they are superfluous. *Bryan v. Collins*, 16 B. 14 ; see *Peard v. Kekewich*, 15 B. 166.

Accumulation directed within the limits of perpetuity, but beyond the limits of the statute, is void only beyond such limits. *Longdon v. Simson*, 12 Ves. 295 ; *Griffiths v. Vere*, 9 Ves. 127.

Accumulation directed for periods longer than the statute allows is void only for the excess.

Where there is a direction to accumulate income with a discretionary power to apply any part of the income towards the maintenance of infants, the power of maintenance continues after the period for accumulation limited by the Thellusson Act has expired. *Pride v. Fooks*, 2 B. 430.

An accumulation for the purpose of paying debts, whether of the testator or other persons, is excepted from the Act, and is good, whether the debts be existing or future debts. *Varlo v. Faden*, 27 B. 255 ; 1 D. F. & J. 211 ; and see *Barrington v. Liddell*, 2 D. M. & G. 505 ; *In re Mason* ; *Mason v. Mason*, (1891) 3 Ch. 467.

Accumulation for payment of debts is excepted from the statute.

But the payment of debts must be *bonâ fide* and the primary object of the accumulation, and therefore if debts are only directed to be paid upon certain contingencies, and incidentally, the case is not within the exception. *Mathews v. Keble*, 4 Eq. 467 ; 3 Ch. 691.

A direction for payment of debts out of the annual income does not affect the rights of creditors, and if the debts are in fact paid out of *corpus* accumulation cannot go on for the purpose of recouping the *corpus*. *Tewart v. Lawson*, 18 Eq. 490 ; see *Norton v. Johnstone*, 30 Ch. D. 649 ; *In re Green* ; *Baldock v. Green*, 40 Ch. D. 610 ; *Biggar v. Eastwood*, 19 L. R. Ir. 49.

And it seems an express direction to accumulate for the purpose of recouping *corpus* would be void. *Tewart v. Lawson*, 18 Eq. 490.

The second exception is of portions for the children of the testator, or any person taking any interest under the will.

What are portions within the exception.

Chap.
XXXVI

The children must be children either of the testator or of a person taking an interest under the will, and therefore if the accumulations are given to a class of children, some of whose parents take nothing under the will, the exception does not apply. *Eyre v. Marsden*, 2 Kee. 564.

But the interest taken by the parent under the will need not be an interest in the fund to be accumulated. *Burt v. Sturt*, 10 Ha. 423; *Barrington v. Liddell*, 2 D. M. & G. 500.

And any interest, however small, given to the parent is sufficient. *Barrington v. Liddell*, 2 D. M. & G. 505; *Evans v. Hellier*, 5 Cl. & F. 126.

A fund to be accumulated and given to children living at the period of distribution is not a portion.

As to what are portions within the exception :

A fund to be accumulated and given to such children as may be living at the time when the accumulations are to cease, is not within the exception. *Burt v. Sturt*, 10 Ha. 415; *Drewett v. Pollard*, 27 B. 196.

Nor are accumulations to be added to capital and given to a child or to the members of a family. *Edwards v. Tuck*, 3 D. M. & G. 40; *Morgan v. Morgan*, 4 De G. & S. 175; 20 L. J. Ch. 441; *Wildes v. Davies*, 1 Sm. & G. 475; *Bourne v. Buckton*, 2 Sim. N. S. 91; *Jones v. Maggs*, 9 Ha. 605; *Mathews v. Keble*, 4 Eq. 467; 3 Ch. 691; *Re Walker*; *Walker v. Walker*, 54 L. T. 792.

Nor is a fund directed to be accumulated and given to a parent for life with remainder to her children. *Watt v. Wood*, 2 Dr. & Sm. 56. *Middleton v. Losh*, 1 Sm. & G. 61, seems irreconcilable with the other decisions, unless it can be supported on the ground that the provision was called a portion; see 10 Ha. 426.

And where a fund directed to be given to children consists of a capital sum of personalty and the accumulations thereof, to which the rents of realty are added, the aggregate fund cannot be separated so as to make the gift of the accumulated rents good as a portion. *Re Walker*; *Walker v. Walker*, 54 L. T. 792.

Accumulation to pay portions charged by another instrument.

But a direction to accumulate a sum to pay portions charged by another instrument is within the exception. *Halford v. Stains*, 16 Sim. 488; *Barrington v. Liddell*, 2 D. M. & G. 505.

And the exception extends also to portions created by the will itself. *Beech v. Lord St. Vincent*, 3 De G. & S. 678 ; 3 Jur. N. S. 762.

Chap.
XXXVI.

Portions given
by the will
itself.

And when an accumulation is directed to raise portions for children if there are any, and if not for some other purpose, the case is within the exception only in the former event. *Re Clulow's Trust*, 1 J. & H. 639.

When there is an indefeasible gift, the legatee has a right to his property at twenty-one, and a direction to accumulate will only be valid till then ; and this will be the case, it would seem, even though the direction to accumulate may be for a period exceeding the limits of the statute. *Gosling v. Gosling*, Johns. 265 ; *Coventry v. Coventry*, 2 Dr. & S. 470 ; *Phillips v. Phillips*, W. N. 1877, 260.

Legatee
having a
vested right
may stop
accumulation
when he
attains 21.

Where there is an indefeasible gift to a charity, whether a corporation or unincorporate, a direction to accumulate is invalid as against it. *Harbin v. Masterman*, (1894) 2 Ch. 184.

Case of
charities.

Where a fund is given upon trust to pay certain annuities out of the income and to accumulate the rest, and the fund and accumulations are given after the death of the annuitants to a legatee absolutely, the legatee is entitled to stop the accumulations on the testator's death and to ask for payment of the fund after providing for the annuities. *Harbin v. Masterman*, (1894) 2 Ch. 184.

Right to stop
accumula-
tions.

But where the accumulation is invalid, not because it is an attempted fetter upon an absolute interest, but merely because it is struck at by the Thellusson Act, *i.e.* where other persons than the legatee have an interest in the accumulations, then, so far as the accumulation extends beyond the statutory period, the income is undisposed of. *Talbot v. Jevers*, 20 Eq. 255 ; *Weatherall v. Thornburgh*, 8 Ch. D. 261 ; *Re Parry* ; *Powell v. Parry*, 60 L. T. 489.

The same result follows, though there is no express trust to accumulate, if a residue is given after the death of annuitants. *Re Hiscoe* ; *Hiscoe v. Waite*, 48 L. T. 510.

When property is given absolutely in the first place, and a direction is afterwards added to accumulate, the accumulations, so far as they are void by the statute, go to the person to whom

Destination
of excessive
accumulation.

Chap.
XXXVI.

the absolute interest is given. *Trickey v. Trickey*, 3 M. & K. 560; *Combe v. Hughes*, 34 B. 127; 2 D. J. & S. 657.

And where an estate is devised subject to a trust for accumulation which is void, the trust sinks for the benefit of the persons for the time being entitled to the estates. *Evans v. Hellier*, 1 M. & Cr. 135; 5 Cl. & F. 114; *Re Clulow's Trust*, 1 J. & H. 639.

But the effect of the statute is not to accelerate any gifts in the will. *Green v. Gascoyne*, 4 D. J. & S. 565.

Accumulations released by the statute pass to the heir or next of kin, as the case may be, or to the residuary legatee if there is one.

Therefore accumulations released by the statute, if the fund to be accumulated is not a residue, in the case of personalty go to form part of the capital of the residue. *Ellis v. Maxwell*, 3 B. 587; *A.-G. v. Poulden*, 3 Ha. 555; *Jones v. Maggs*, 9 Ha. 605; *Crawley v. Crawley*, 7 Sim. 427; *In re Tharel's Trusts*, 13 L. R. Ir. 337.

In the case of realty the residuary devisee or heir is entitled according as the will is governed by the Wills Act or not. *Nettleton v. Stephenson*, 3 De G. & S. 366.

Accumulations of residue.

If the fund to be accumulated is residuary, the void accumulations go to the heir or next of kin, according to the nature of the property, and if the fund is mixed, to the heir and next of kin proportionately. *Green v. Gascoyne*, 4 D. J. & S. 565; *Halford v. Stains*, 16 Sim. 488; *Eyre v. Marsden*, 2 Kee. 564; 4 M. & Cr. 431; *Wildes v. Davies*, 1 Sm. & G. 475; *Ralph v. Carrick*, 5 Ch. D. 984; 11 Ch. D. 873; see *Elborne v. Goode*, 14 Sim. 165.

The income of accumulations forms part of the income of the residue.

It seems that the income of accumulations not being a residue belongs to the tenant for life of the residue as income, and does not form part of the capital of the residue. *In re Phillips*; *Phillips v. Levy*, 49 L. J. Ch. 198; 28 W. R. 340; see, however, *Crawley v. Crawley*, 7 Sim. 427.

Income of accumulations of rents and profits retains its character of realty. *Eyre v. Marsden*, 2 Kee. 577.

When there is a contingent gift to A. with accumulation in the meantime, and the gift is given over to B. if the contingency does not happen, B., upon taking an indefeasible interest, is entitled to the accumulations within twenty-one years from the testator's death, together with the income of those accumulations. *Morgan v. Morgan*, 20 L. J. Ch. 111, 441; 15 Jur. 319; but see *Bryan v. Collins*, 16 B. 14.

CHAPTER XXXVII.

CONDITIONS SUBSEQUENT.

IN the case of conditions subsequent, if the condition is impossible, impolitic, or illegal, the gift remains, at any rate, where there is no gift over. *Thomas v. Howell*, 1 Salk. 170; *Walker v. Walker*, 2 D. F. & J. 255; *Wilkinson v. Wilkinson*, 12 Eq. 604.

And it seems, even where there is a gift over, but the performance of the condition has become impossible, the previous gift remains. *Graydon v. Hicks*, 2 Atk. 16; *Jones v. Suffolk*, 1 B. C. C. 528; *Collett v. Collett*, 35 B. 312; *Sutcliffe v. Richardson*, 13 Eq. 606; and see *Wedgwood v. Denton*, 12 Eq. 290; *In re Bird*; *Bird v. Cross*, 8 Mews R. 326.

In most of these cases, however, the condition, being marriage with consent, became, by the death of the person, whose consent was required, a condition in general restraint of marriage. See, too, *Yates v. University College, London*, L. R. 7 H. L. 438.

A condition forfeiting a legacy in the event of the legatee marrying a certain person without the testator's consent has been limited to a marriage in the testator's lifetime. *Booth v. Meyer*, 38 L. T. N. S. 125.

A condition must be so framed that it may be capable of ascertainment at any moment whether it has or has not taken effect. Thus, where a bequest of chattels to the owner of a title was followed by a direction that no person was to take an absolute interest till the expiration of twenty-one years after the death of all persons living at the testator's death and afterwards attaining the title, the direction was held void for uncer-

Chap.
XXXVII.

Conditions subsequent, impossible, impolitic, or illegal, are ineffectual, whether there is a gift over or not.

**Chap.
XXXVII.**

Condition
requiring
consent of
several per-
sons becomes
impossible by
death of some.

tainty. *In re Viscount Exmouth; Viscount Exmouth v. Praed*, 23 Ch. D. 158.

A condition subsequent requiring the consent of several persons becomes impossible and is discharged by the death of all, or even of one of them, though in the latter case it would seem the condition is satisfied by the consent of the survivors. *Peyton v. Bury*, 2 P. W. 625; *Grant v. Dyer*, 2 Dow. 73; *Jones v. Suffolk*, 1 B. C. C. 528; *Aislabie v. Rice*, 3 Mad. 256; see *Dawson v. Oliver Massey*, 2 Ch. D. 753.

Consent of
guardians.

Where the consent of guardians is required and the testator appoints no guardians, an application should be made to the Court for the appointment of guardians, and the consent of a guardian appointed by the infant would not be sufficient. *In re Brown's Will*, 18 Ch. D. 61.

So where the consent of parents or guardians is required and the parents are dead, guardians must be appointed to give their consent. *Ib.*

Condition not
performed
through
ignorance
takes effect,

A condition subsequent not performed owing to the ignorance of the legatee of its existence, nevertheless works a forfeiture, where the property is given over, whether in the case of personality or of realty. *Hodges' Trusts*, 16 Eq. 92; *Porter v. Fry*, 1 Vent. 197; *Astley v. Earl of Essex*, 18 Eq. 290.

unless the
devisee is
heir.

But this does not apply, where the devisee is the heir who has a title independent of the will. *Doe d. Kenrick v. Lord Beauclerk*, 11 East, 667; *Doe d. Taylor v. Crisp*, 8 Ad. & E. 778; *Murphy v. Lineham*, 1 R. 9 C. L. 123.

Condition
forfeiting a
legacy if not
claimed.

So, when there is a clause forfeiting a legacy, if not claimed within a given time, the forfeiture takes effect, if the legacy is not claimed, though the legatee received no notice of the legacy or of the death of the testator. *Burgess v. Robinson*, 3 Mer. 7; *Tulk v. Houlditch*, 1 V. & B. 248; *Powell v. Rawle*, 18 Eq. 243.

What
amounts to a
claim.

It has been held that the filing of a bill for the administration of the estate before the time appointed is equivalent to a claim by the legatees, though they may not be parties to the suit. *Tollner v. Marriott*, 4 Sim. 19.

But when the gift was to persons who should within a year establish their title as next of kin, an order made shortly after

the testator's death, an originating summons directing inquiries as to the persons entitled was held not to let in next of kin who made no claim within the year. *In re Hartley; Stedman v. Dunster*, 34 Ch. D. 742.

In the case of realty a valid condition subsequent is effectual even where there is no gift over. *Cooke v. Turner*, 15 M. & W. 727; 14 Sim. 493; 15 Sim. 611; 16 Sim. 482; and see *Evan-turel v. Evanturel*, L. R. 6 P. C. 1.

A condition is effectual without a gift over in the case of realty.

In *Cooke v. Turner* there was a gift over, but the case seems to have been decided at common law independently of the gift over.

And a condition subsequent may operate to destroy a contingent, as well as to divest a vested estate. *Egerton v. Earl Brownlow*, 4 H. L. 1.

With regard to personalty, a condition subsequent is effectual without a gift over, except as far as the rules of the civil law have been adopted with regard to certain classes of conditions, see *post*, p. 500. *Dickson's Trust*, 1 Sim. N. S. 37; *Craven v. Brady*, 4 Eq. 209; 4 Ch. 296.

Personalty follows the rule as modified by the doctrine of *in terrorem*.

As to what conditions are valid, it has been said, that nothing can be made the subject of a condition in a will, which could not be made the subject of a contract or wager in life. See *per* the Lord Chief Baron, *Egerton v. Earl Brownlow*, 4 H. L. 1, p. 150.

Test of validity of a condition.

Perhaps no general rule can safely be laid down; but, independently of the question whether a condition involves anything illegal or impolitic, in order that it may be effectual the meaning of the testator must be reasonably clear and precise; and, therefore, conditions to reside in a certain house, and to educate children in England, have been held too uncertain to work a forfeiture. *Fillingham v. Bromley*, T. & R. 530; *Clavering v. Ellison*, 3 Dr. 451; 7 H. L. 707.

Condition must be clearly defined.

A gift over in the event of a change of religion by the legatee is valid. *Hodgson v. Halford*, 11 Ch. D. 959.

Conditions decreasing an annuity if the annuitant again lives with her husband, or increasing a legacy to a husband in the event of a separation from his wife, are invalid. *Bean v. Griffiths*, 19 Jur. 1045; *Cartwright v. Cartwright*, 3 D. M. & G. 982.

Chap.
XXXVII.

Condition not
to dispute a
will.

A condition not to dispute a will is valid in law if the will is unsuccessfully disputed, though it will not avail to make an invalid disposition good. *Cooke v. Turner*, 15 M. & W. 727; *Evanturel v. Evanturel*, L. R. 6 P. C. 1; *Stevenson v. Abingdon*, 11 W. R. 935; see *Warbrick v. Varley*, 30 B. 347; *Hope v. International Financial Society*, 4 Ch. D. 327; *Phillips v. Phillips*, W. N. 1877, 260; see *Massy v. Rogers*, 11 L. R. Ir. 409.

On the other hand, a condition not to institute legal proceedings touching the estate and effects devised, is too general, and is bad. *Rhodes v. Muswell Hill Land Co.*, 29 B. 561.

A clause forfeiting an annuity if the annuitant should interfere or attempt to interfere in the management of the testator's estate is good, and takes effect if the annuitant brings an action against the trustees without reasonable cause. *Adams v. Adams*, 45 Ch. D. 426; (1892) 1 Ch. 369.

A condition that trustees shall not pay over the shares of legatees without taking from them bonds, that they will not intermarry or illegally cohabit with certain persons, will not be enforced. *Poole v. Bott*, 11 Ha. 33.

Computation
of time.

As to the rules for computing time, within which a condition is required to be performed, see *Lester v. Garland*, 15 Ves. 248; *Miller v. Wheatley*, 28 L. R. Ir. 144.

CONDITIONS IN RESTRAINT OF MARRIAGE.

A condition in restraint of marriage applies only to a lawful marriage. *In re M'Laughlin*, 1 L. R. Ir. 42.

Condition
subsequent in
restraint of
marriage is
good in realty.

A condition subsequent in restraint of marriage, where the estates are for life or in fee, is, it seems, valid as regards realty. *Jones v. Jones*, 1 Q. B. D. 279; *Bellairs v. Bellairs*, 18 Eq. 510.

But not as
regards an
estate tail.

But such a condition is void, if imposed upon a tenant in tail, as repugnant to the estate. *Earl of Arundel's Case*, 3 Dyer, 342 b.

Condition in
restraint of
marriage is
void in per-
sonalty.

It is clear, that in the case of personalty a condition subsequent in general restraint of marriage is void, whether the condition forfeits or only reduces the gift. *Morley v. Rennold-*

son, 2 Ha. 570; W. N. (1894) 174; W. N. (1895) 26; *Re Bellamy*; *Pickard v. Holroyd*, 48 L. T. 212.

Chap.
XXXVII.

And the same rule applies to a mixed fund arising from the proceeds of sale of realty and pure personalty. *Lloyd v. Lloyd*, 2 Sim. N. S. 255; *Bellairs v. Bellairs*, 18 Eq. 510. Mixed fund.

It would seem that the rule applies to real and personal estate given together. *Duddy v. Gresham*, 2 L. R. Ir. 443.

And it seems, that a legacy out of the proceeds of land directed by the testator to be converted would follow the same rule. See *Hart's Trusts*, 3 De G. & J. 195; *Bellairs v. Bellairs*, *supra*. Legacy out of proceeds of sale of land.

On the other hand, a limitation to a person till marriage is good, the intention being to provide for the person while he remains unmarried, and not to prevent him from marrying. *Potter v. Richards*, 24 L. J. Ch. 488; *Heath v. Lewis*, 3 D. M. & G. 954; *In re King's Trusts*, 29 L. R. Ir. 401. Limitation till marriage is good.

And conditions in partial restraint of marriage are valid, both with regard to realty and personalty, though with regard to the latter the further question arises whether they are *in terrorem* or not. Conditions in partial restraint of marriage are good though they may be ineffectual.

Thus, conditions restraining a widow or widower, whether of the person making the will or of a stranger, from marrying again: *Evans v. Rosser*, 2 H. & M. 190; *Newton v. Marsden*, 2 J. & H. 356; *Allen v. Jackson*, 1 Ch. D. 399; or requiring a marriage with consent: *Sutton v. Jewks*, 2 Ch. Rep. 95; or restraining marriage before a certain age: *Stackpole v. Beaumont*, 3 Ves. 89, are good as conditions, though they may be ineffectual if there is no gift over, on the principle hereafter mentioned.

So conditions against marriage with a Scotchman, or in a manner not in accordance with the rules of the Quakers, or with a person of a particular religion, or a domestic servant, are valid. *Perrin v. Lyon*, 9 East, 170; *Haughton v. Haughton*, 1 Moll. 611; *Duggan v. Kelly*, 10 Ir. Eq. 295, 473; *Hodgson v. Halford*, 11 Ch. D. 959; *Jenner v. Turner*, 50 L. J. Ch. 161; 29 W. R. 99; *In bonis Knox*, 23 L. R. Ir. 542.

In the case of real estate such a condition is valid even if there is no gift over. *Haughton v. Haughton*, 1 Moll. 611.

A condition defeating a vested interest on marriage applies

Chap.
XXXVII.

**Doctrine of
in terrorem.**

if the marriage takes place after the date of the will but during the testator's lifetime. *Bullock v. Bennett*, 7 D. M. & G. 283; *In re King's Trusts*, 29 L. R. Ir. 401.

In the case of personalty, certain conditions subsequent, though good in law, are, in accordance with the rule of the Civil Law, held to be void, and *in terrorem* merely, if there is no gift over.

It seems the doctrine that certain conditions are *in terrorem* merely applies to real estate when it is included with personalty in the same gift. *Duddy v. Gresham*, 2 L. R. Ir. 443.

Of this nature are the conditions in partial restraint of marriage already mentioned. *Marples v. Bainbridge*, 1 Mad. 590; *Reynish v. Martin*, 3 Atk. 330; *Wheeler v. Bingham*, 1 Wils. 135; 3 Atk. 364; *W. v. B.*, 11 B. 621.

And the same rule applies to a condition not to contest the will. *Powell v. Morgan*, 2 Vern. 90.

But if there is a gift over, these conditions are effectual, the gift over being considered sufficient evidence, that they were not meant to be *in terrorem* merely. *Cleaver v. Spurling*, 2 P. W. 526; *Tricker v. Kingsbury*, 7 W. R. 652; *Charlton v. Coombes*, 11 W. R. 1038; *Craven v. Brady*, 4 Eq. 209; 4 Ch. 296.

**Whether the
doctrine
applies to
conditions
precedent.**

On the question whether the doctrine of *in terrorem* applies to conditions precedent, the cases show :

1. A condition precedent, requiring consent to marriage generally, without limitation of age, is effectual if there is a gift over. *Malcolm v. O'Callaghan*, 2 Mad. 349; *Gardiner v. Slater*, 25 B. 509.

2. The gift of a smaller sum, in the event of marriage without consent, has the same effect. *Creagh v. Wilson*, 2 Vern. 572; *Gillett v. Wray*, 1 P. W. 284.

3. A condition precedent, requiring consent to marriage if under a certain age, is good if there is no gift over. *Stackpole v. Beaumont*, 3 Ves. 89; see *Gray v. Gray*, 23 L. R. Ir. 399.

4. A condition precedent not to marry under a certain age is good, though there is no gift over. *Yonge v. Fursee*, 8 D. M. & G. 756.

5. A gift to a legatee, if he marries a particular person, only

takes effect in that event. *Davis v Angel*, 4 D. F. & J. 524. *Quære* whether *Smith v Cowdery*, 2 S. & St. 358, is overruled.

Chap.
XXXVII.

6. But it seems a condition precedent requiring marriage with consent generally, and without a gift over, would be considered *in terrorem* merely. *Reeves v. Herne*, 5 Vin. Ab. 343, pl. 41; *Reynish v. Martin*, 3 Atk. 330; see *Clarke v. Parker*, 19 Ves. 1.

Where a condition precedent to a legacy requires marriage with consent, then, although as regards the consent it may be treated as *in terrorem*, yet the legacy will not vest until marriage. *Garbut v. Hilton*, 1 Atk. 381; *Gray v. Gray*, 23 L. R. Ir. 399.

In cases under 4 and 5 the conditions can only be waived testamentarily, and no consent of the testator to a marriage in his lifetime, not within the condition, will make the gift good.

Waiver of conditions by the testator.

But where the condition is marriage with consent, whether precedent or subsequent, the consent of the testator to a marriage in his lifetime satisfies the condition. *Clarke v. Berkeley*, 2 Vern. 720; *Parnell v. Lyon*, 1 V. & B. 479; *Wheeler v. Warner*, 1 S. & St. 304; *Tweeddale v. Tweeddale*, 7 Ch. D. 633; see *Violet v. Brookman*, 5 W. R. 342.

Consent of the testator to a marriage in his lifetime satisfies a condition requiring consent.

And the condition does not apply to a subsequent marriage. *Hutcheson v. Hammond*, 3 B. C. C. 128; *Crommelin v. Crommelin*, 3 Ves. 227.

But in such a case the consent of a testator to a marriage to take place after his death does not obviate the necessity for the consent of the persons named in the will. *Lowry v. Pattison*, 1 R. 8 Eq. 372.

Consent of testator to a marriage to take place after his death.

And, where the gift is till marriage, the consent of the testator to a marriage does not extend the gift. *Bullock v. Bennett*, 7 D. M. & G. 283; see *Cooper v. Cooper*, 6 Ir. Ch. 217.

It seems, that where there is a gift upon marriage with consent, the legatee has her whole life to perform the condition and the legacy is not forfeited by a first marriage without consent. *Randall v. Payne*, 1 B. C. C. 55; *Beaumont v. Squire*, 17 Q. B. 905. *Clifford v. Beaumont*, 4 Russ. 325, was decided on the ground, that the gift was only upon a marriage

Condition of marriage with consent is satisfied by a second marriage with consent.

Chap.
XXXVII.

with consent, which had not in fact been obtained. See, too, *Duddy v. Gresham*, 2 L. R. Ir. 443.

But if other provision is made for the legatee in the event of marriage without consent, the condition must be limited to a first marriage. *Lowe v. Manners*, 5 B. & Ald. 917.

Condition
requiring the
consent of
several per-
sons how
performed.

In the case of a condition requiring the consent of several persons, if the consent required is that of executors or trustees, the consent of those who renounce or do not act is not necessary. *Worthington v. Evans*, 1 S. & St. 165; *Boyce v. Corbally*, Ll. & G. t. Plunkett, 102; *Ewens v. Addison*, 4 Jur. N. S. 1034; *White v. M'Dermot*, I. R. 7 C. L. 1; see *Clarke v. Parker*, 19 Ves. 1.

But if there is only a single executor who renounces, his consent must, it seems, be obtained. *Graydon v. Hicks*, 2 Atk. 16; but the case is doubtful.

And a condition requiring the consent of several persons is performed by obtaining the consent of the survivors. *Ewing v. Anderson*, 7 W. R. 23; *Dawson v. Oliver Massey*, 2 Ch. D. 753.

If the consent of guardians is required, guardians must be appointed if there are none. *In re Brown's Trusts*, 18 Ch. D. 61.

Where the testator does not prescribe any formalities, it is enough if the consent is substantially given. *Daley v. Desbouverie*, 2 Atk. 261; *In re Smith*; *Keeling v. Smith*, 44 Ch. D. 654.

Apportion-
ment of con-
dition.

Where a testator directs, that if a certain sum should be applied in favour of A., A. should apply a sum of different amount in favour of B., the condition will be compulsory on A. only if the whole of the sum in question is applied in his favour, and the condition will not be apportioned. *Caldwell v. Cresswell*, 6 Ch. 279; *Fazakerley v. Ford*, 4 Sim. 390.

Condition
requiring a
release.

A condition requiring a release within a given time, with a gift over, if the release is not given within the time, must be literally complied with. *Simpson v. Vickers*, 14 Ves. 341, 348.

But if there is no gift over, a release given within a reasonable time will satisfy the condition. *Simpson v. Vickers*,

14 Ves. 341; *Taylor v. Topham*, 1 B. C. C. 168; *Paine v. Hyde*, 4 B. 468; *Hollinrake v. Lister*, 1 Russ. 506; see *Scarlett v. Lord Abinger*, 34 B. 338; *Ledward v. Hassels*, 2 K. & J. 370.

Chap.
XXXVII.

A legacy given on condition of conveying real estate to a third person gives a legatee who has conveyed no lien upon the land for the legacy. *Barker v. Barker*, 10 Eq. 438.

A condition of forfeiture, if legatees cease to carry on the testator's business, takes effect if they sell it to a company, although they become managing directors and in substance sole shareholders of the company. *In re Sax*; *Barned v. Sax*, 62 L. J. Ch. 688; 68 L. T. 849; 41 W. R. 584; 3 R. 638.

Ceasing to
carry on
business.

As to the performance of conditions to take a particular name or adopt a particular coat of arms, see a valuable note in Davidson's Prec., vol. iii. 356; *D'Eyncourt v. Gregory*, 1 Ch. D. 441; *Austen v. Collins*, 54 L. T. 903; *Bevan v. Mahon-Hagan*, 27 L. R. Ir. 399; 31 L. R. Ir. 342; *Re Varley*; *Thornton v. Varley*, 62 L. J. Ch. 652; 68 L. T. 665.

Name and
arms clause.

As to conditions of residence, see *Wynne v. Fletcher*, 24 B. 430; *Walcot v. Botfield*, Kay 534; *Clavering v. Ellison*, 7 H. L. 707, and cases there cited; *Parry v. Roberts*, 19 W. R. 378; *Dunne v. Dunne*, 3 Sm. & G. 22; 7 D. M. & G. 207; *In re Moir*; *Warner v. Moir*, 25 Ch. D. 605; *Tagore v. Tagore*, 1 Ind. Ap. 387, 397; *In re Arbib and Class' Contract*, (1891) 1 Ch. 601; *Partridge v. Partridge*, (1894) 1 Ch. 351.

Conditions of
residence.

The effect of sect. 51 of the Settled Land Act, 1882, upon conditions of residence is, that the tenant for life may sell and enjoy the income of the proceeds notwithstanding the condition, but if he does not sell he must perform the condition. *In re Paget's Settled Estates*, 30 Ch. D. 161; *In re Haynes*; *Kemp v. Haynes*, 37 Ch. D. 306.

Effect of s. 51
of Settled
Land Act.

REPUGNANT CONDITIONS.

Conditions repugnant to the estate previously given are void. *In re Dugdale*; *Dugdale v. Dugdale*, 38 Ch. D. 176; *Corbett v. Corbett*, 13 P. D. 136; 14 P. D. 7.

Chap.
XXXVII.

Restraints
upon aliena-
tion.

Unlimited
restraint.

Limited re-
straint on
alienation.

Thus, conditions in general restraint of alienation are bad, if absolute interests have been given in the first place.

1. Where there is a devise in fee, followed by an absolute restraint upon alienation, the restraint is void for repugnancy. Co. Lit. 222 b.; *Hood v. Oglander*, 34 B. 513.

But a condition that the feoffee shall not alien "to such a one, naming his name, or to any of his heires, or of the issues of such a one, etc., or the like," is said to be good. Co. Lit. 223 a.

Upon this principle, conditions not to sell, except to a sister or sisters or their children, and not to sell out of the family, have been held valid. *Doe d. Gill v. Pearson*, 6 East, 173; *Re Macleay*, 20 Eq. 186; see *Ludlow v. Bunbury*, 35 B. 36; *Billing v. Welch*, 1 R. 6 C. L. 88; see the principle discussed in *In re Rosher*; *Rosher v. Rosher*, 26 Ch. D. 801.

But a condition not to sell except to one person is bad, since a person might be selected who would be certain not to purchase. *Muschamp v. Bluett*, Bridg. 137; *Attwater v. Attwater*, 18 B. 330.

And a condition, that, if the devisee in fee should wish to sell in the lifetime of the testator's wife, she should have the option of purchasing at a price, which was about one-fifth of the value of the estate, has been held to be bad. *In re Rosher*; *Rosher v. Rosher*, 26 Ch. D. 801.

Alienation
limited in
time.

This case also decides, that a restraint upon alienation is bad though limited in point of time. Upon this question, see, too, *Renaud v. Tourangeau*, L. R. 2 P. C. 4; *Large's Case*, 2 Leon. 82; 3 Leon. 182; 2 Jarm. 860; *Churchill v. Marks*, 1 Coll. 445; *Kiallmark v. Kiallmark*, 26 L. J. Ch. 1; *In re Dugdale*; *Dugdale v. Dugdale*, 38 Ch. D. 176; *Corbett v. Corbett*, 13 P. D. 136; 14 P. D. 7.

Alienation by
particular
form of con-
veyance.

In the same way, conditions restraining alienation by any particular form of conveyance, as by charge or mortgage, are bad. *Willis v. Hiscox*, 4 M. & Cr. 201; *Ware v. Cann*, 10 B. & Cr. 433.

Thus, a gift over of so much land as an absolute owner charges or incumbers would be bad. *Willis v. Hiscox*, *supra*.

The effect of the Settled Land Act, 1882, sect. 51, upon

conditions in restraint of alienation must also be borne in mind. *In re Ames*; *Ames v. Ames*, (1893) 2 Ch. 479; *Re Sudbury & Pointon Estates*; *Vernon v. Vernon*, 68 L. T. 707. See p. 503.

Chap.
XXXVII.

Directions that the rents upon property devised are not to be raised have been held invalid. *A.-G. v. Catherine Hall*, Jac. 381; *A.-G. v. Greenhill*, 33 B. 193.

Direction not
to raise rents.

These rules apply to personalty, so that if an absolute interest is given, a gift over if the legatee disposes of his interest is void. *Bradley v. Peixoto*, 3 Ves. 324; *In re Jones's Will*, 23 L. T. N. S. 211; *Metcalf v. Metcalf*, 43 Ch. D. 633; *In re Bourke's Trusts*, 27 L. R. Ir. 573.

Gift over of
personalty on
alienation.

And a gift over upon alienation by a tenant for life with a power of disposition by deed or will is invalid. *Re Wolstenholme*; *Marshall v. Aizlewood*, 43 L. T. N. S. 752.

It is however clear that absolute interests, whether vested or contingent, may be given over upon alienation before the period of possession. *Kearsley v. Woodcock*, 3 Ha. 185; *Re Payne*, 25 B. 556; *Pearson v. Dolman*, 3 Eq. 315; *In re Porter*; *Coulson v. Capper*, (1892) 3 Ch. 481.

Gift over on
alienation
before period
of distribu-
tion.

2. A condition giving over an estate in fee on bankruptcy of the devisee is void. *In re Machu*, 21 Ch. D. 838; *In re Dugdale*; *Dugdale v. Dugdale*, 38 Ch. D. 176.

Defeasance on
bankruptcy.

3. A gift over, if a devisee or legatee to whom an absolute interest is given does not dispose of his interest or dies intestate, is void both as regards realty and personalty. *Holmes v. Godson*, 8 D. M. & G. 152; 2 Jur. N. S. 383; 25 L. J. Ch. 317; *Barton v. Barton*, 3 K. & J. 512; *Lightbourne v. Gill*, 3 B. P. C. 250; *Re Mortlock's Trusts*, 3 K. & J. 456; *Re Yalden*, 1 D. M. & G. 53; *Watkins v. Williams*, 3 Mac. & G. 622; *Henderson v. Cross*, 29 B. 216; *Perry v. Merritt*, 18 Eq. 152; *In re Wilcocks's Settlement*, 1 Ch. D. 229; *In re Jenkins' Trusts*, 23 L. R. Ir. 162; *Stretton v. Fitzgerald*, 23 L. R. Ir. 310, 466.

Gift over if
legatee dies
intestate.

So a direction following a devise to tenants in common in fee that if no distribution should be made during the lives of the tenants in common the property should devolve to their children is invalid. *Shaw v. Ford*, 7 Ch. D. 669.

Chap.
XXXVII.

Such conditional gifts over are good according to Scotch law. *Barstow v. Pattison*, L. R. 1 H. L. Sc. 392.

After a devise to A. and his heirs, a gift over if A. shall die without leaving lawful issue to his next heir at law is void. *In re Parry and Daggs*, 31 Ch. D. 130; see *Gulliver v. Vaux*, 8 D. M. & G. 167, n.

It has been held that a gift over if the legatee does not dispose of his interest does not become valid by his death in the testator's lifetime. *Hughes v. Ellis*, 20 B. 193; *Greated v. Greated*, 26 B. 621; but these cases were doubted in *In re Stringer's Estate*; *Shaw v. Jones-Ford*, 6 Ch. D. 1. They were followed however in *In re Jenkins' Trusts*, 23 L. R. Ir. 162. See p. 519 *post*.

Gift over if previous gift is void.

4. A gift over in the event of a previous gift being void at law or in equity is good. *De Themmines v. De Bonneval*, 5 Russ. 288.

Condition not to bar entail.

5. A tenant in tail cannot by condition subsequent be prevented from barring his estate tail. *Dawkins v. Lord Penrhyn*, 4 App. C. 51; see *Milbank v. Vane*, (1893) 3 Ch. 79.

Condition determining an estate tail in part.

A condition intended to determine an estate tail in part only, for instance, a clause directing that the interests of tenants in tail shall cease as concerns the rights and interests of the person making default, but not farther or otherwise, is void. *Seymour v. Vernon*, 10 Jur. N. S. 487; 12 W. R. 729.

Estate tail to cease as if the tenant in tail were dead.

A condition in certain events determining estates tail, as if the tenant in tail were dead, will be made good by supplying the words dead without issue. *Astley v. Earl of Essex*, 18 Eq. 290.

Absolute interest directed to cease as if the donee were dead.

But, if an absolute interest has been given, such a condition will be ineffectual, since the legatee's interest would not determine with his death, and, therefore, the interest directed to cease is not the exact interest previously given. *Bird v. Johnson*, 18 Jur. 976; *Catt's Trusts*, 2 H. & M. 46; 33 L. J. Ch. 495; *Musgrave v. Brooke*, 26 Ch. D. 792. See *In re Cornwallis*; *Cornwallis v. Wykeham-Martin*, 32 Ch. D. 388.

Conditions postponing enjoyment beyond 21.

6. So, too, when vested interests have once been given, restrictions postponing the enjoyment of the property beyond the age of twenty-one are void, unless the property is otherwise

disposed of in the meantime. *Saunders v. Vautier*, Cr. & Ph. 240; *Rocke v. Rocke*, 9 B. 66; *Re Young's Settlement*, 18 B. 199; *Gosling v. Gosling*, Johns. 265; *Harbin v. Masterman*, (1894) 2 Ch. 184.

Chap.
XXXVII.

7. A gift over upon alienation takes effect if the legatee alienates, though he may not have been aware of the condition. *Carter v. Carter*, 3 K. & J. 617.

Legatee not
aware of
condition.

A direction that the receipt of an annuitant shall be the only discharge which the executor shall be bound to accept, and that the annuitant may be required to attend to give receipts, does not prevent the annuitant from assigning. *Arden v. Goodacre*, 11 C. B. 883.

Where there is a gift over upon alienation the execution of a charge effects a forfeiture, though the charge is not acted on, and is renounced by the person in whose favour it is given. *Hurst v. Hurst*, 21 Ch. D. 278; see *Lockwood v. Sikes*, 51 L. T. 562.

Charge dis-
claimed.

Where the property is given over upon alienation the term has been held to include only voluntary alienation, and not a hostile bankruptcy. *Lear v. Leggett*, 1 R. & M. 690; *Pym v. Lockyer*, 12 Sim. 394; *Graham v. Lee*, 23 B. 388; *Re Kelly's Settlement*; *West v. Turner*, 59 L. T. 494; *Re Harvey*; *Ex parte Pixley v. Harvey*, 60 L. T. 710; 37 W. R. 620.

Meaning of
the term
alienation.

On the other hand, the presentation of a petition by the legatee under the Insolvent Debtors' Act, or under the arrangement clauses of the Bankruptcy Act, 1869, is a voluntary alienation. *Rochford v. Hackman*, 9 Ha. 475; *In re Amherst's Trusts*, 13 Eq. 464; see *Ex parte Dawes*; *In re Moon*, 17 Q. B. D. 275.

If there is a strong intention of personal benefit to the legatee, as if the gift is to him for life and not to his assigns, a gift over upon alienation has been held to include bankruptcy. *Cooper v. Wyatt*, 5 Mad. 482.

A direction that a life interest given to A. and her assigns shall determine if she should do anything to deprive herself of the right to receive the income is not inconsistent with the life interest, and effect will be given to it. *Craven v. Brady*, 4 Eq.

Gift to A. and
her assigns.

Chap.
XXXVII.

209; 4 Ch. 296; *Re Kelly's Settlement*; *West v. Turner*, 59 L. T. 494.

"Do or
suffer."

If the property is given over if the legatee should "do or suffer," or "do or permit" anything whereby the property would be vested in another, this includes a hostile bankruptcy. *Roffey v. Bent*, 3 Eq. 739; *Ex parte Eyston*; *In re Throckmorton*, 7 Ch. D. 145.

Under similar words the issue of a writ of sequestration against the legatee has been held to work a forfeiture. *Dixon v. Rowe*, 35 L. T. N. S. 549.

"Payable to
or vested in."

A gift over if the legatee does or suffers something whereby the property would "become payable to or vested in" another includes a receiving order in bankruptcy (a) but not a Scotch sequestration (b). *In re Sartoris's Estate*; *Sartoris v. Sartoris*, (1892) 1 Ch. 11; see *Ex parte Dawes*; *In re Moon*, 17 Q. B. D. 275 (a); *Re James*; *Clutterbuck v. James*, 62 L. T. 454 (b).

A clause forfeiting an annuity on an attempt to sell it takes effect if the annuitant petitions for the benefit of the Insolvent Debtors' Act. *Martin v. Margham*, 14 Sim. 230.

Attempt to
charge.

A gift over if the legatee should attempt to assign or charge his legacy takes effect if the legatee executes a settlement purporting to assign it, although the assignment is by law inoperative (a), but it does not take effect on his executing a document purporting to be an equitable assignment if he had no intention to create a charge by the document (b). *In re Porter*; *Coulson v. Capper*, (1892) 3 Ch. 481 (a); *In re Sheward*; *Sheward v. Brown*, (1893) 3 Ch. 502 (b).

A settlement of property to which the settlor will be entitled under A.'s will will not include a life interest given by A., but subject to forfeiture on attempted alienation. *In re Crawshay*; *Walker v. Crawshay*, (1891) 3 Ch. 176.

Anticipation.

A gift over on anticipating a life interest given without power of anticipation does not take effect on the execution of a mortgage during coverture. *In re Wormald*; *Frank v. Muzeen*, 43 Ch. D. 630.

Taking in
execution.

A gift over if the life interest of the beneficiary "should be taken in execution by any process of law" applies to equitable execution. *Blackman v. Fysh*, (1892) 3 Ch. 209.

The execution of a deed of inspectorship is not within a gift over in the event of the legatee taking the benefit of any Act for the relief of insolvent debtors. *Montefiore v. Enthoven*, 5 Eq. 35.

Chap.
XXXVII.
Deed of
inspectorship.

As to the meaning of alienation, see *Avison v. Holmes*, 1 J. & H. 530, p. 540.

Insolvency has no technical meaning, but means inability to pay debts. *Freeman v. Bowen*, 35 B. 17; *Re Muggeridge*, Joh. 625; 29 L. J. Ch. 288; see *De Tastet v. Le Tavernier*, 1 Kee. 161; *Billson v. Crofts*, 15 Eq. 314; *Nixon v. Verry*, 29 Ch. D. 196.

Meaning of
insolvency.

A declaration of insolvency in S. Australia is insolvency within the meaning of a gift over upon insolvency. *Aylwin's Trusts*, 16 Eq. 585; see *In re Levy's Trusts*, 30 Ch. D. 119; *In re Broughton*; *Peat v. Broughton*, 57 L. T. 8.

A gift over of a life interest given to the testator's widow in the event of her doing anything whereby she would be deprived of the right to receive the rents takes effect upon the marriage of the widow without making any settlement. *Craven v. Brady*, 4 Eq. 209; 4 Ch. 296.

Marriage.

The execution of an irrevocable power of attorney to receive an annuity is within a clause of forfeiture in the event of assignment or disposition by way of anticipation. *Oldham v. Oldham*, 3 Eq. 404.

Power of
attorney.

Where the property is given over upon bankruptcy, the gift over *prima facie* includes a bankruptcy which takes place after the date of the will and is subsisting at the testator's death, notwithstanding strong words of futurity. *Yarnold v. Moorhouse*, 2 R. & M. 364.

Gift over
upon bank-
ruptcy
includes a
subsisting
bankruptcy.

And it has been held to include a bankruptcy which took place before the date of the will, and was subsisting at the death. *Manning v. Chambers*, 1 De G. & S. 282; *Seymour v. Lucas*, 1 Dr. & Sm. 177; *Trappes v. Meredith*, 10 Eq. 604; 7 Ch. 248; *Metcalf v. Metcalf*, 43 Ch. D. 633; (1891) 3 Ch. 1.

But since the object of the gift over is merely to preserve the property from going to strangers, if the bankruptcy is annulled before the period of distribution the forfeiture does not take effect. *Lloyd v. Lloyd*, L. R. 2 Eq. 722; *Trappes v. Meredith*, 9 Eq.

A bankruptcy
annulled be-
fore the period
of distribution
will not work
a forfeiture.

Chap.
XXXVII.

229; *In re Parnham's Trusts*, 46 L. J. Ch. 80; 13 Eq. 413; *Samuel v. Samuel*, 12 Ch. D. 152; see *Robins v. Rose*, 43 L. J. Ch. 334; *Robertson v. Richardson*, 30 Ch. D. 623; *Re Broughton*; *Peat v. Broughton*, 57 L. T. 8.

In the case of an immediate gift it appears the forfeiture will not take effect, where the bankruptcy is annulled within a year from the testator's death if there is no right to any payment till then. *Lloyd v. Lloyd*, L. R. 2 Eq. 722; *Ancona v. Waddell*, 10 Ch. D. 157.

This principle would not apply if one of the terms of the annulment is that the dividends accruing up to that time should be paid to the assignee. *In re Parnham's Trusts*, 13 Eq. 413.

In the case of an immediate specific bequest for life a clause of forfeiture does not operate if the bankruptcy is annulled before the day on which the first income is payable. *White v. Chitty*, L. R. 1 Eq. 372; see *Metcalfe v. Metcalfe*, 43 Ch. D. 633; (1891) 3 Ch. 1.

These principles have no application where the freedom from bankruptcy is a condition precedent to the vesting. *Cox v. Fonblanque*, 6 Eq. 482; see *Samuel v. Samuel*, *supra*.

Bankruptcy
during prior
life estate.

Similarly, if the life interest given over on bankruptcy is subject to a prior life interest, the gift over takes effect on a bankruptcy during the life of the prior tenant for life. *Sharp v. Cosserat*, 20 B. 470; *Muggeridge's Trust*, Johns 625.

And a gift over upon bankruptcy will carry over an accrued share directed to go in the same manner as the original share, though not accruing till after bankruptcy. *Dorsett v. Dorsett*, 30 B. 250.

Penal
servitude

A proviso for cesser if the beneficiary "should by his own act or by operation of law be deprived of the absolute personal enjoyment" of his interest does not take effect by the beneficiary being convicted of felony and sentenced to penal servitude. *Re Dash*; *Darley v. King*, 57 L. T. 219.

Separate
estate.

8. Under the Married Women's Property Act, 1882 (sect. 2), every woman married since the Act may hold as her separate property, and dispose of as if she were a *feme sole*, all real and

personal property belonging to her at the time of her marriage or acquired or devolving upon her after marriage.

Chap.
XXXVII.

And by sect. 5, every woman married before the Act may hold and dispose of in manner aforesaid, as her separate property, all real and personal property, the title to which accrues after the commencement of the Act.

In the cases above mentioned a married woman may take and dispose of the legal estate in land, and a deed acknowledged is not necessary. *In re Drummond and Davie's Contract*, (1891) 1 Ch. 524.

The Act does not affect the husband's right, on his wife's death, to her undisposed of personalty, nor destroy his tenancy by the curtesy in her undisposed of real estate. *In re Lambert's Estate*; *Stunton v. Lambert*, 39 Ch. D. 626; *Surman v. Wharton*, (1891) 1 Q. B. 491; *Hope v. Hope*, (1892) 2 Ch. 336.

Before the Married Women's Property Act, 1882, it was settled that the corpus as well as the income of real or personal estate might be given to the separate use of a married woman. *Taylor v. Meuls*, 4 D. J. & S. 607; *Cooper v. Macdonald*, 7 Ch. D. 288.

Separate use.

The separate use may of course be so framed as to apply to the rents and profits only, and not to the corpus. *Troutbeck v. Boughey*, L. R. 2 Eq. 534.

And in a limitation in a marriage settlement to A., "during her present coverture for her sole and separate use," it was held that the separate use only attached to income accruing during her then coverture. *Shute v. Hogge*, 58 L. T. 546.

In cases not within the Married Women's Property Act, 1882, the effect of the separate use as regards the capital is to give the married woman a power of disposition.

Separate use
before the
Married
Women's
Property Act,
1882.

If the married woman does not exercise her power of disposition the separate use is exhausted, and upon her death the husband's rights revive.

Therefore, in the case of land given to the separate use of a married woman who dies without making a disposition, the husband is entitled to an estate by the curtesy. *Roberts v. Dixwell*, 1 Atk. 607; *Follett v. Tyrer*, 14 Sim. 125; *Appleton v. Rowley*, 8 Eq. 139; *Cooper v. Macdonald*, 7 Ch. D. 288;

Effect of
separate use
on curtesy.

Chap.
XXXVII.

overruling *Hearle v. Greenbank*, 3 Atk. 675; and *Moore v. Webster*, 3 Eq. 267.

The case of *Bennett v. Davis*, 2 P. W. 316, is sometimes cited as an authority, that an express declaration that curtesy is not to attach to lands given to the separate use of a married woman would be effectual where no disposition is made of the lands. The question did not arise in the case, as both husband and wife were alive.

Chattels real
to separate
use.

Chattels real belonging to the wife to her separate use vest in the husband, *jure mariti*, if she dies without disposing of them. *Archer v. Lavender*, 1 R. 9 Eq. 220.

Chattels in
possession.

And it seems chattels in possession belonging to the wife to her separate use, and not disposed of, belong to the husband without the necessity of taking out administration to the wife. *Molony v. Kennedy*, 10 Sim. 254; *Bird v. Peagrum*, 13 C. B. 639.

In cases not within the Married Women's Property Act, 1882, the marital right will be held to be excluded only by a clear indication of intention to exclude it.

What words
create a
separate use.

The word "separate" is sufficient for this purpose, whether the legatee is married or not. *Archer v. Rorke*, 7 Ir. Eq. 478.

On the other hand, such words as "own use," "absolute use," or to pay to "her own proper hands," are not enough, whether the legatee is married or single, or whether trustees are interposed or not. *Rycroft v. Christy*, 3 B. 238; *Tyler v. Luke*, 2 R. & M. 183; *Blacklow v. Laws*, 2 Ha. 49; *Taylor v. Stainton*, 2 Jur. N. S. 634; *Wills v. Sayer*, 4 Mad. 409; *Roberts v. Spicer*, 5 Mad. 491; *Beales v. Spencer*, 2 Y. & C. C. 651.

Disposal.

But if the legatee is married at the time and the legacy is directed to be at her own disposal, a separate use is created. *Kirk v. Paulin*, 7 Vin. Ab. 95, pl. 43; *Prichard v. Ames*, T. & R. 222; *Bland v. Dawes*, 17 Ch. D. 794.

Separate
receipt.

Directions that the receipt of a legatee, "notwithstanding coverture," and that her "sole and separate receipt" should be a good discharge, have been held to create a separate use. *Cooper v. Wells*, 11 Jur. N. S. 923; *In re Molyneux's Estate*, 1 R. 6 Eq. 411.

The same has been held where the legatee was married, and

her receipt was declared to be a sufficient discharge. *Lee v. Prieaux*, 3 B. C. C. 381; *Re Lorimer*, 12 B. 521.

Chap.
XXXVII.

And where a legacy was given, if husband and wife should not be living together, half to the husband and half to the wife absolutely, the wife took to her separate use. *Shewell v. Dwarries*, Johns. 172.

So, too, a direction that the devisee is to receive the rents herself, whether married or single, creates a separate use. *Goulden v. Camm*, 1 D. F. & J. 146.

Probably a gift for the maintenance and support of a woman referred to by the testator as married would create a separate use. *Darley v. Darley*, 3 Atk. 399; *Cape v. Cape*, 2 Y. & C. Ex. 543; see *Wardle v. Claxton*, 9 Sim. 524.

Maintenance

And a power given to trustees to apply income for the maintenance and support of a widow authorises payment of the income to her separate use. *Austin v. Austin*, 4 Ch. D. 233; see *In re Peacock's Trusts*, 10 Ch. D. 490.

The word sole may in some cases be sufficient to create a separate use, but *prima facie* it has no such technical meaning, and the burden of proof is upon those who assert it has. *Lewis v. Mathews*, L. R. 2 Eq. 177; *Massey v. Rowen*, I. R. 1 Eq. 110; L. R. 4 H. L. 288.

Effect of the
word "sole"
in creating a
separate use.

In a marriage settlement where the whole object is to secure to the wife a separate estate, the word may have the force of separate. *Ex parte Ray*, 1 Mad. 199.

But in a will where no such intention can be presumed, further indication is necessary.

a. A gift to "A., the wife of B., for her sole use," creates a separate use. *Inglefield v. Coghlan*, 2 Coll. 247; *Farrow v. Smith*, W. N. 1877, 21; *In re Amies' Estate*; *Milner v. Milner*, W. N. 1880, 16; *Bland v. Dawes*, 17 Ch. D. 794.

b. The same has been held where, though the legatee was not in the gift to her referred to as married, it appeared from other parts of the will that she was a married woman. *Green v. Britten*, 1 D. J. & S. 649; *Hartford v. Power*, I. R. 2 Eq. 204.

But this is not the case if the legatee be the testator's own wife, so that she must be discovert when the will takes effect.

T.W.

L L

Chap.
XXXVII.

Gilbert v. Lewis, 1 D. J. & S. 38 ; *Green v. Marsden*, 1 Dr. 646.

c. If the legatee is unmarried at the time, but the testator shows that he contemplates her marriage, and expressly wishes to guard against the claims of a future husband, the same effect will follow. *Ex parte Killick*, 3 M. D. & De G. 480; *In re Tarsey's Trust*, L. R. 1 Eq. 561 ; see *Baker v. Ker*, 11 L. R. Ir. 3.

d. So, too, if a trust is created confined to the particular gift, and no other motive for it is discernible. *Adamson v. Armitage*, 19 Ves. 416.

But the mere interposition of trustees will not give the word the force of separate if the trust is created for the general purposes of the will, and not confined to the particular gift. *Massey v. Rowen*, L. R. 4 H. L. 288.

Restraint
upon antici-
pation.

9. A married woman may be restrained from anticipating the rents and profits of real estate and the income of personality given to her separate use ; a restraint upon anticipation may also be imposed upon corpus.

A restraint upon anticipation imposed by the will of an English testator binds a legatee domiciled in a country where such a restraint is not recognised. *Peillon v. Brooking*, 25 B. 218.

The restraint can only be imposed upon property belonging to the separate use. *Baggett v. Meux*, 1 Coll. 138 ; *Stogdon v. Lee*, (1891) 1 Q. B. 661.

A restraint upon anticipation applicable to the rents of real estate devised to a married woman in tail does not prevent her from enlarging the estate tail to a fee with her husband's consent. *Cooper v. Macdonald*, 7 Ch. D. 289.

The case would probably be the same if the restraint upon anticipation were expressly applied to the corpus. *Cooper v. Macdonald*, *supra*.

A married woman entitled to real estate for life to her separate use without power of anticipation, with a testamentary power of disposition, may release her power under the Act for the abolition of fines and recoveries. *Heath v. Wickham*, 5 L. R. Ir. 285.

In the case of a restraint upon anticipation applied to the corpus of real estate, the effect appears to be to restrain the married woman from disposing either of the income or the corpus during coverture except by will. *Baggett v. Meux*, 1 Coll. 138; 1 Ph. 627.

Chap.
XXXVII.
Restraint applied to corpus of property producing income.
Restraint upon anticipation of fund of personality.

In the case of a fund of personalty given to a married woman with a restraint upon anticipation, a distinction has been drawn between a fund invested so as to produce income, and a gift of a share of proceeds of sale or cash not producing income, the restraint upon anticipation being held effectual in the former case, and ineffectual in the latter. See *In re Ellis' Trusts*, 17 Eq. 409; *In re Croughton's Trusts*, 8 Ch. D. 460; *In re Benton*; *Smith v. Smith*, 19 Ch. D. 277; *In re Clarke's Trusts*, 21 Ch. D. 748; *In re Taber*; *Arnold v. Kayess*, 46 L. T. 805; 51 L. J. Ch. 721; 30 W. R. 883; *In re Coombes*; *Coombes v. Parfitt*, W. N. 1883, 169; see, too, *Re Sarel*, 4 N. R. 321; 10 Jur. N. S. 876; *Re Gaskell's Trusts*, 11 Jur. N. S. 780; *Re Sykes' Trusts*, 2 J. & H. 415.

This distinction is now overruled. The true test is, does the testator intend the fund to be paid to the married woman, or does he intend her to enjoy it only in the shape of income. *In re Bown*; *O'Halloran v. King*, 27 Ch. D. 411.

a. Where a fund is given immediately to a legatee with a direction to pay it to her, the direction to pay overrides a restraint on anticipation. *In re Grey's Settlements*; *Acason v. Greenwood*, 34 Ch. D. 85, 712 (as to the 1500*l.*, which was not, however, before the Court).

A fortiori is this the case, if the fund is directed to be paid over after a life interest, as force can then be given to the restraint on anticipation by applying it to the reversionary interest. *In re Bown*, *supra*.

b. But where a fund is given on trust for a legatee, a restraint on anticipation will be effectual; and the fact that the fund is given after a life interest or a period of accumulation, does not of itself show that the restraint on anticipation was meant to cease when the fund fell into possession. *In re Grey's Settlements*, *supra*; *In re Tippet's and Newbould's Contract*, 37 Ch. D. 444; *Re Holmes*; *Hallows v. Holmes*, 67 L. T. 335.

Direction to pay.
Fund to be held by trustees.

Chap.
XXXVII.

A restraint may be effectually confined to a reversionary interest. *In re Bown, supra.*

Where there was a direction to accumulate the income of a fund and the rents of realty during the life of an annuitant and after her death to stand possessed of the fund and realty with the accumulations in trust for a married woman, whom the testator restrained from anticipation during the annuitant's life, it was held that the restraint was effectual, and the married woman could not stop the accumulations. *In re Spencer; Thomas v. Spencer*, 30 Ch. D. 183.

Determines
with
coverture.

The restraint upon anticipation attaches only to the separate estate, and therefore determines with coverture. *Barton v. Briscoe*, Jac. 603; *Jones v. Salter*, 2 R. & M. 208; *Woodmeston v. Walker*, 2 R. & M. 197.

If nothing is done with the property in the meantime it revives on future coverture. *Tullett v. Armstrong*, 1 B. 1; 4 M. & Cr. 390; *Scarborough v. Borman*, 1 B. 34; 4 M. & Cr. 378; *Re Gaffee*, 1 Mac. & G. 541; see *Hamilton v. Hamilton*, (1892) 1 Ch. 396.

The restraint may be confined to marriage with a particular husband by name. *Morris v. Morris*, 4 Dr. 33; *Hawkes v. Hubbuck*, 11 Eq. 5; see *In re Molyneux's Estate*, I. R. 6 Eq. 411.

A sale or conversion of the property destroys the separate use. *Wright v. Wright*, 2 J. & H. 647.

What words
create a re-
straint upon
anticipation.

Difficulties have sometimes arisen as to what words are necessary to create a restraint on anticipation.

A direction that there is to be no sale or mortgage of the estate devised or the rents arising from it during the life of the devisee, amounts to a restraint on anticipation. *Baggett v. Meux*, 1 Coll. 138; 1 Ph. 627; *Goulden v. Camm*, 1 D. F. & J. 146; *Steedman v. Poole*, 6 Ha. 193; see, however, *Re Hutchings to Burt*, 59 L. T. 490.

The same has been held of a direction that the receipts of the devisee alone, after the payment of the rents devised shall have become due, should be sufficient discharges. *Field v. Evans*, 15 Sim. 375; *Baker v. Bradley*, 7 D. M. & G. 597; *White v. Herrick*, 21 W. R. 454; *In re Smith; Chapman v. Wood*, 51 L. T. 501.

But a direction to pay to the legatee personally, or on her receipt alone, will not restrain anticipation. *Re Ross's Trust*, 1 Sim. N. S. 196; *Wagstaff v. Smith*, 9 Ves. 520, 524; *Acton v. White*, 1 S. & St. 429.

Chap.
XXXVII.

When the legatee has a power to appoint the accruing rents, but not by way of anticipation, and in default of appointment there is a gift to her for her separate use, the restraint upon anticipation applies only to the exercise of the power. *Barrymore v. Ellis*, 8 Sim. 1; *Medley v. Horton*, 14 Sim. 222.

But if the gift in default of appointment is followed by a receipt clause applied to the same rents as those she has power to appoint, the restraint upon anticipation will extend to the whole gift. *Moore v. Moore*, 1 Coll. 54; *Brown v. Bamford*, 1 Ph. 620.

Since the Married Women's Property Acts, 1882 and 1893, the effect of a restraint upon anticipation is that a judgment or order cannot be enforced against income restrained from anticipation, whether accrued due at the date of the judgment or order and then remaining unpaid or afterwards accruing. *Cox v. Bennett*, (1891) 1 Ch. 617; *Hood Barrs v. Cathcart*, (1894) 2 Q. B. 559; *Pillers v. Edwards*, 71 L. T. 788.

Enforcement
of judgment
against
income subject
to restraint.

Sect. 2 of the Married Women's Property Act, 1893 (56 & 57 Vict. c. 63), provides that in any proceeding by a woman or by a next friend on her behalf, the Court may order payment of the costs of the opposite party out of property subject to a restraint upon anticipation. See *Hood Barrs v. Cathcart*, (1894) 3 Ch. 376; *In re Godfrey*; *Thorne-George v. Godfrey*, W. N., (1895) 12.

CHAPTER XXXVIII.

LIMITATIONS BY WAY OF REMAINDER—DIVESTING.

I. WHAT CANNOT BE GIVEN OVER.

Chap.
XXXVIII.
Remainder in
chattels.

IN some things nothing less than an absolute interest can be given.

There can be no remainder in the strict sense of the word of chattels. At law a grant of chattels for life vests the whole legal interest in the tenant for life.

This rule, however, does not apply to gifts by will. It has long been settled that under a gift by will of a term to A. for life, and after his death to B., or to the children of A., the legal interest passes by way of executory devise to the person entitled under the will on the death of the tenant for life. *Manning's Case*, 8 Rep. 94 b; *Lampet's Case*, 10 Rep. 46 b; *Stevenson v. Mayor of Liverpool*, L. R. 10 Q. B. 81.

In some cases the nature of the property is such as not to allow of successive limitations; thus:—

Consumable
articles cannot
be given over.

Things *quæ ipso usu consumuntur* cannot be given over, unless they form part of a stock-in-trade. *Randall v. Russell*, 3 Mer. 190; *Andrew v. Andrew*, 1 Coll. 690; *Groves v. Wright*, 2 K. & J. 347; *Bryant v. Easterson*, 7 W. R. 298; 5 Jur. N.S. 166; *Phillips v. Beal*, 32 B. 25; *Cockayne v. Harrison*, 13 Eq. 432; see *Re Hall's Will*, 19 Jur. 974; *Re Colyer*, 55 L. T. 344; *Connolly v. Connolly*, 56 L. T. 304.

Even in the case of stock-in-trade if the tenant for life is not to be liable for depreciation he takes absolutely. *Breton v. Mockett*, 9 Ch. D. 95.

There can be
no remainder

Absolute interests can of course not be limited over by way of remainder; thus a devise, if A. dies without heirs, after a

prior devise to A. in fee, is void. *Tilbury v. Tarbut*, 3 Atk. 617; 1 Ves. Sen. 88.

And in the same way absolute interests in personalty cannot be given to several persons in succession. *Byng v. Lord Strafford*, 5 B. 558; see *In re Percy*; *Percy v. Percy*, 24 Ch. D. 616.

A gift over, which would be invalid supposing the prior legatee survives the testator, does not become valid by his death in the testator's lifetime.

Therefore, a gift of personalty to A. and the heirs of his body, remainder to B., lapses by A.'s death in the testator's lifetime. *Harris v. Davis*, 1 Coll. 416; see, however, *In re Stringer's Estate*; *Shaw v. Jones-Ford*, 6 Ch. D. 1; see p. 506 *ante*.

So, too, a gift of consumable articles to A. for life, remainder to B., lapses by A.'s death before the testator. *Andrew v. Andrew*, 1 Coll. 690.

There can be no gift over of so much as a legatee does not dispose of where an absolute interest has been given to the legatee. *Watkins v. Williams*, 3 Mac. & G. 622; *Henderson v. Cross*, 29 B. 216; *Bower v. Goslett*, 27 L. J. Ch. 249; 6 W. R. 8.

Such a limitation is, however, valid in a settlement. *Turner v. Caulfield*, 7 L. R. Ir. 347.

Nor can there be a gift over of what remains after payment of the debts of a legatee to whom an absolute interest is given. *Perry v. Merritt*, 18 Eq. 152.

However, a gift at the legatee's death of whatever remain after a gift to the legatee indefinitely may be construed as a disposition of the residue at the legatee's death, so as to cut him down to a life estate. *Constable v. Bull*, 3 De G. & S. 411; *Adams' Trust*, 14 W. R. 18; *Bibbens v. Potter*, 10 Ch. D. 733; *Re Sheldon and Kemble*, 53 L. T. 527; *In re Holden*; *Holden v. Smith*, 57 L. J. Ch. 648; 59 L. T. 358; see *In re Russell*, 53 L. J. Ch. 400; reversed, 52 L. T. 559; see also *Re Colyer*; *Millikin v. Snelling*, 55 L. T. 344.

And if a fund is given to a person expressly for life, with a power of disposing of it during life or by will, a gift of it after the death of the donee of the power is good, so far as the power

Chap.
XXXVIII.

after an absolute interest.

A gift over invalid in itself does not become valid by the death of the prior legatee before the testator.

Gift over of so much as a legatee does not dispose of is void.

Gift over after a life interest, with power of disposition.

**Chap.
XXXVIII**

is not exercised. *Pennock v. Pennock*, 13 Eq. 144; *In re Thomson's Estate*; *Herring v. Barrow*, 13 Ch. D. 144; 14 *ib.* 263; *In re Stringer's Estate*; *Shaw v. Jones-Ford*, 6 Ch. D. 1; *Moore v. Ffolliott*, 11 L. R. Ir. 206; see *Re Brook's Will*, 2 Dr. & S. 362; *In re Heginbotham*; *Wilson v. Heginbotham*, W. N. 1884, 179.

*Estate pur
autre vie.*

An executory gift over of an estate *pur autre vie* given to a man and his heirs is valid, and cannot be destroyed by the devisees in fee. *In re Barber's Settled Estates*, 18 Ch. D. 625.

II. LIMITATIONS DISTINGUISHED.

Limitations (excluding immediate limitations of particular estates) fall most naturally into limitations disposing of property in which partial or contingent interests have been previously given, and limitations varying and re-arranging previous dispositions.

*Legal re-
mainders and
executory
interests.*

A legal remainder of freehold must be supported by a previous estate of freehold, otherwise it can only be supported as an executory devise.

And as no limitation can be a remainder following upon an estate less than an estate for life, so no limitation can be a remainder following upon a determinable fee, or any greater estate. *Fearne*, C. R. 225; *Seymour's Case*, 10 Rep. 95 b.

But where an estate can take effect as a remainder, it will never be construed an executory devise or springing use. *Carwardine v. Carwardine*, 1 Ed. 27; *Goodtitle v. Billington*, Dougl. 725; *Fearne*, C. R. 386; *Doe d. Scott v. Roach*, 5 M. & S. 482; the reason given being that "executory interests, not by way of remainder, unless engrafted on an estate tail, cannot be barred, and consequently there is a tendency in such interests to a perpetuity, which is contrary to the policy of the law." *Smith's Ex. Dev.* 71.

The death of the testator is the time to ascertain whether a limitation is a contingent remainder or an executory devise. Thus, under a devise to A. for life, and then to the first and other sons of B. in tail, if A. dies in the lifetime of the testator, and B. has no sons living at the testator's death, the devise to

the sons of B. will take effect as an executory limitation.
Hopkins v. Hopkins, Ca. t. Talb. 44.

Chap.
 XXXVIII.

Where there is a gift to A. for life, with remainder to such of her children as before or after her death attain twenty-one, the devise must be construed as executory, as in the case of children under twenty-one at the death of A. it could not take effect as a remainder. *In re Lechmere and Lloyd*, 18 Ch. D. 524; *Miles v. Jarvis*, 24 Ch. D. 633; *Dean v. Dean*, (1891) 3 Ch. 150.

Contingent remainders can no longer fail by forfeiture, surrender, or merger, but (except in cases within 40 & 41 Vict. c. 33) they will fail by the failure of the particular estate of freehold, before the remainder is ready to come into possession. *Rhodes v. Whitehead*, 2 Dr. & Sm. 532; *Price v. Hall*, 5 Eq. 399; *Percival v. Percival*, 9 Eq. 386; *Brackenbury v. Gibbons*, 2 Ch. D. 417.

Incidents of
 remainders.

Contingent remainders of copyholds are liable to fail in the same way by failure of the particular estate before they have vested. *Lane v. Pannel*, 1 Roll. Rep. 238, 317, 438; *Fearne*, C. R. 310, 320.

Copyholds.

This rule does not apply to equitable remainders, which are not remainders proper but in the nature of executory interests. *Hopkins v. Hopkins*, 1 Atk. 581; *Re Eddels' Trusts*, 11 Eq. 559.

Equitable
 remainders.

A legal estate outstanding in a mortgagee is sufficient to support the remainders. *Astley v. Micklethwait*, 15 Ch. D. 59.

A contingent remainder in an estate *pur autre vie* requires no particular estate to support it. *Pickersgill v. Grey*, 10 W. R. 207; 31 L. J. Ch. 394; *Ferguson v. Ferguson*, 17 L. R. Ir. 552.

Estates *pur
 autre vie*.

The rule does not of course apply to personalty.

Personalty.

By the Contingent Remainders Act, 1877 (40 & 41 Vict. c. 33), it is enacted:

40 & 41 Vict.
 c. 33.

"Every contingent remainder, created by any instrument executed after the passing of this Act (2nd August, 1877), or by any will or codicil revised or republished by any will or codicil executed after that date, in tenements or hereditaments of any tenure, which would have been valid as a springing or shifting

**Chap.
XXXVIII.**

use or executory devise or other limitation, had it not had a sufficient estate to support it as a contingent remainder, shall, in the event of the particular estate determining before the contingent remainder vests, be capable of taking effect in all respects as if the contingent remainder had originally been created as a springing or shifting use or executory devise or other limitation."

A doubt has been suggested whether the Act applies where the remainder has become vested in one member of a class, as in such a case it cannot be said that the particular estate has determined "before the contingent remainder vests." Williams on Seisin, pp. 205—208.

An estate may be a remainder or an executory devise, according to the events.

An estate may, according to the events that happen, be either a remainder or an executory devise. For instance, if after life estates there is a devise to children in fee, and if they die under twenty-one over, the devise over, if there are children to take who die under twenty-one, would be an executory devise; yet the implied devise over, in case there were no children to take at all, would be a contingent remainder. *Doe d. Evers v. Challis*, 18 Q. B. 224; 7 H. L. 531; *Brookman v. Smith*, L. R. 6 Ex. 291, p. 305; see *In re Bence*; *Smith v. Bence*, (1891) 3 Ch. 242.

Remainder distinguished from an immediate vested estate subject to a term.

A remainder must be distinguished from an immediate vested estate, subject to a term; thus, where an estate of freehold is limited after a term, it is either a vested estate or an executory devise. For instance, a devise to A. for a term of eighty years, if he shall so long live, and after his death to B., gives B. strictly speaking an executory interest, since A. may live longer than eighty years, and the freehold would therefore be in suspense during the remainder of A.'s life. It has, however, been held that B. takes a vested interest, "for the mere possibility that a life in being may endure for eighty years to come does not amount to a degree of uncertainty sufficient to constitute a contingency." Fearne, C. R. 21; *Napper v. Sanders*, Hutt. 118; cit. 3 Atk. 781; *Lord Derby's Case*, cit. Lit. Rep. 370.

This applies, however, only "where the life cannot exceed the term, and the term must determine with the life." It does

not apply, for instance, where the term is only for sixty years. *Beverley v. Beverley*, 2 Vern. 131.

Chap.
XXXVIII.

In the same way a devise, after payment of debts, is not a remainder but an immediate vested interest. *Barnardiston v. Carter*, 1 P. W. 505; 3 B. P. C. 64; *Bagshaw v. Spencer*, 1 Ves. Sen. 142; see 1 Coll. Jur. 378; and see *ib.* 214; and *Hathorn v. Foster*, 9 T. L. R. 497; 10 T. L. R. 64.

Devise after
payment of
debts is
vested.

Again, dispositions by way of remainder may be intended to take effect only after the determination of prior partial interests, or they may be alternative contingent remainders intended to provide for the case of prior contingent limitations not taking effect. In the former case, if any of the intermediate limitations are void, the remainders fail with them; in the latter, the limitations are good if the events upon which they are to take effect happen. *Brudenell v. Elves*, 1 East, 442; *Crompe v. Barrow*, 4 Ves. 681.

Remainders
and alterna-
tive con-
tingent
limitations.

Thus, in a devise to A. for life, then to his first son for life, and after his decease to the first and other sons of such first son successively in tail, and in default of issue of A., or in case of his not having any at his decease over, if A. has a son and grandson, the devise over in default of issue of A. is a disposition by way of remainder of something not previously disposed of; while the devise, in case of his not having any issue at his decease, is an alternative contingent limitation, disposing of something previously disposed of, in the event of that disposition failing in a particular way. *Monypenny v. Dering*, 2 D. M. & G. 145; *Doe d. Evers v. Challis*, 18 Q. B. 224; 7 H. L. 531; *Percival v. Percival*, 9 Eq. 386.

And the same limitation may, according to the events that happen, be a disposition to take effect after the failure of prior limitations, or a substitutional limitation intended to meet the case of prior limitations never taking effect at all. For instance, a limitation in default, or for want of persons to take under prior limitations for life or in tail, takes effect either in default of persons to take the prior estates, or after the determination of their estates. *Goodright v. Jones*, 4 Mau. & S. 88; *Lewis d. Ormond v. Waters*, 6 East, 336; see *Doe v. Dacre*, 1 B. & P. 250; 8 T. R. 112.

Chap.
XXXVIII.

Whether a contingency runs through a whole series of limitations.

When a particular estate is limited upon a contingency, and the subsequent estates are limited as remainders upon it, the contingency *prima facie* applies to the whole series of limitations. *Davis v. Norton*, 2 P. W. 390; *Doe d. Watson v. Shipphard*, Dougl. 75; *Tolderry v. Colt*, 1 Y. & C. Ex. 240, 627; 1 M. & W. 250.

Similarly, when an interest is given to a person, and then in a certain event a different interest is given with limitations over, the contingency applies to all the subsequent limitations. *Gray v. Golding*, 6 Jur. N. S. 474; *Cattley v. Vincent*, 15 B. 198; *Findon v. Findon*, 24 B. 83; *Lett v. Randall*, 10 Sim. 112; *Paylor v. Pegg*, 24 B. 105.

Cases where the subsequent limitations are independent gifts.

On the other hand, if the subsequent limitations, or any of them, can be looked upon as independent gifts, they will not be liable to the contingency of preceding gifts. *Lethieullier v. Tracy*, 3 Atk. 774; Amb. 204; *Boosey v. Gardener*, 5 D. M. & G. 122; *Doutty v. Laver*, 14 Jur. 188; *Partridge v. Foster*, 35 B. 545; *In re Blight*; *Blight v. Hartnoll*, 13 Ch. D. 858.

In the same way, if a particular gift is expressed to be made contingent from motives applicable to that gift only, subsequent gifts will not be contingent. *Horton v. Whittaker*, 1 T. R. 346.

Subsequent gifts subject to prior contingent gifts.

And if subsequent gifts can be read as given, subject to the prior limitations, they will not be liable to the contingencies of prior gifts. *Sheffield v. Earl of Coventry*, 2 D. M. & G. 551; see *Pearson v. Rutter*, 3 D. M. & G. 398; 6 H. L. 61; *Hole v. Davies*, 34 B. 345; *ante*, p. 456.

Where the ultimate limitation sums up the prior contingencies.

In the same way, when there has been a gift in one event to one set of issue in fee, and upon another event to another set of issue in tail, a gift over in default of such issue may be construed as referring to a failure of all the prior limitations, and not merely as a remainder dependent upon the limitations to the second class of issue taking effect. *Doe d. Lees v. Ford*, 2 E. & B. 970.

Whether an ultimate limitation applies to the whole

As to whether in a devise of Whiteacre to A. and his issue, and then to B. and his issue, and of Blackacre to B. and his issue, and then to A. and his issue, and in default of issue of A.

and B. over, the ultimate gift includes both estates, see *Gordon v. Gordon*, L. R. 5 H. L. 254; see, too, *Adshead v. Willetts*, 29 B. 358.

Chap.
XXXVIII.

of property
which has
been given in
two inde-
pendent lines.

III. DIVESTING.

A vested interest which is given over in certain events is divested, if those events happen, though the gift over may be void, or though the legatee to take under the gift over dies before the testator. *Doe d. Blomfield v. Eyre*, 5 C. B. 713; *Robinson v. Wood*, 6 W. R. 728; 27 L. J. Ch. 726; *O'Mahoney v. Burdett*, L. R. 7 H. L. 388; *Hurst v. Hurst*, 21 Ch. D. 278; *Donohoe v. Mooney*, 27 L. R. Ir. 26. In *Jackson v. Noble*, 2 Kee. 500, the question was, whether the event upon which the gift over was to take effect had happened, and it was held it had not, the period during which it was to take effect being limited to the lives of the persons to take under the gift over.

A gift which
is given over
in certain
events is
divested if
those events
happen.

But if the contingency of there being a person to take living at the time can be looked upon as part of the event upon which the gift over is to take effect, the original gift will remain if there is no such person. *Crozier v. Crozier*, 15 Eq. 282.

Upon this principle, under a gift to the testator's two sons and daughter in equal shares, with a gift over of the daughter's share, if she should die without issue, to the survivors or survivor of the sons, it was held that the daughter, having survived the sons, took absolutely. *Jones v. Davies*, 28 W. R. 455; see *Eaton v. Barker*, 2 Coll. 124.

In the case of a substitutional gift to several persons, or to such of them as may survive the tenant for life, if none survive the tenant for life the original gift remains, whether the gift is vested or contingent. *Sturgess v. Pearson*, 4 Mad. 411; *Wagstaff v. Crosbie*, 2 Coll. 746; *Re Saunders' Trust*, L. R. 1 Eq. 675.

Substitutional
gifts to sur-
vivors.

It is indifferent whether the gift is in the simple form "to several or the survivors," or whether there is an express gift over, in the event of any members of a class dying before the tenant for life, to the survivors; in such a case, if none survive

Chap.
XXXVIII.

the tenant for life, the original gift remains. *Harrison v. Foreman*, 5 Ves. 207; *Cambridge v. Rous*, 25 B. 409; *Marriott v. Abell*, 7 Eq. 478.

Substitutional
gifts to
children.

Similarly, the shares of parents given in the event of their dying before the tenant for life to their children, remain absolute if there are no children. *Smither v. Willock*, 9 Ves. 233; *Hodgson v. Smithson*, 21 B. 356; 8 D. M. & G. 604.

Distinction
between a
gift over in
certain events
of the whole
and of a
partial
interest.

An important distinction must, however, be drawn between a gift over of the whole of a prior interest in certain events, and a gift over of a portion of the prior interest in certain events. In the latter case the prior interest is divested only so far as is necessary to give effect to the gift over.

Thus, if there is a devise in fee, followed by a gift over to another person for life if the devisee dies without issue, the devisee in that event, nevertheless, takes the fee, subject only to the life interest. *Gatenby v. Morgan*, 1 Q. B. D. 685.

IV. THE CONSTRUCTION OF GIFTS OVER.

Gifts over on
two different
events to
different per-
sons where
both events
happen.

The exact
event must
happen in
order that a
gift over may
take effect.

When property is given over in one event to one person, and in another event to another, and both events occur simultaneously, the original gift is not divested. *Ormerod v. Riley*, 12 Jur. N. S. 112. See *Drennan v. Andrew*, 36 L. J. Ch. 1.

When there is a gift over upon a certain contingency, it will not take effect unless the exact contingency happens. Thus, if there is a gift to A. with a gift over if he dies in the testator's lifetime, and A. dies simultaneously with the testator, the gift over does not take effect. *Wing v. Angrave*, 8 H. L. 183; *Elliott v. Smith*, 22 Ch. D. 236.

There are here two distinct and independent events, in which the gift to A. will lapse, death in the testator's lifetime and death simultaneously with the testator, one of which the testator has contemplated and the other not. No doubt it may be said, that the gift over might be read as equivalent to "if A. does not survive me to B.;" but this would be making a will for the testator, since the event that has happened does not include the event contemplated, and it cannot be said that if

the gift over was to have effect if A. died in the testator's lifetime, *à fortiori* it was to have effect if A. died simultaneously with the testator. The most that can be affirmed is that if the testator could be consulted he would probably say, that the gift over was to have effect equally in either event.

But where the events which happen include the events contemplated by the testator, so that it may be said, if the gift was to go over in the events mentioned, *à fortiori* it must have been meant to go over in the events that have happened, the gift over will take effect. This is the rule mentioned by Cicero as having been adopted in the case of *Curius v. Coponius*: "*M. Curium, qui hæres institutus esset ita, 'mortuo postumo filio,' cum filius non modo non mortuus, sed ne natus quidem esset, hæredem esse oportere.*" Pro. Cæc. 18.

Cases where the events which happen include the events upon which the gift over is to take effect.

And the test of the applicability of the rule will be found in the possibility of putting the argument in its favour in the form of *non modo non—sed ne quidem*—if, for instance, property is given to A. if he fulfil certain conditions, and if he neglect to fulfil them to B., and A. dies in the testator's lifetime, the gift over to B. will take effect, although, strictly speaking, the testator never contemplated that the performance of the conditions annexed to the gift to A. might become impossible through A.'s death in his lifetime. The preceding estate being out of the way, in any mode whatever, the remainder takes effect; and the rule applies whether the gift is void in its inception or becomes void in its result. See *Jones v. Westcomb*, 1, Eq. Ab. 245, pl. 10; *Gulliver v. Wickett*, 1 Wils. 105; *Avelyn v. Ward*, 1 Ves. Sen. 420; *Meadows v. Parry*, 1 V. & B. 124; *Warren v. Rudall*, 4 K. & J. 603; 9 H. L. 420; *Brock v. Bradley*, 33 B. 670; *Davies v. Davies*, 30 W. R. 918; see *Wilkinson v. Thornhill*, 61 L. T. 362.

The failure of the prior gift in these cases was not owing merely to the fact that the first taker did not survive the testator, as in the cases under the former head, but to that fact, *plus* the non-performance of the condition, since, if the first taker had survived the testator he would not have taken an indefeasible interest till the condition had been satisfied.

So a gift to several persons by name, with a gift over if they

Chap.
XXXVIII.

Construction
of gifts over
upon death of
the legatee
under a given
age.

Case where
the legatee
dies before
the testator
under the
given age.

Where the
legatee dies
over the
given age
before the
testator.

Gift to class
with gift over
if all die
under 21,
where the
class never
comes into
existence.

If all die
under 21
before the
testator.

should die in the testator's lifetime, will take effect with regard to the shares of those who are dead at the date of the will. *Barnes v. Jennings*, L. R. 2 Eq. 448.

If there is a gift to a person with a gift over in the event of his death in a particular manner, as, for instance, to A., and if he dies under twenty-one to B. :—

1. If A. dies under twenty-one, in the lifetime of the testator, the gift over takes effect. *Darrel v. Molesworth*, 2 Vern. 378 ; *Willing v. Baine*, 2 Eq. Ab. 545, pl. 32 ; 3 P. W. 115 ; *Humphreys v. Howes*, 1 R. & M. 639 ; *Re Green's Estate*, 1 Dr. & Sm. 68 ; *Rackham v. De la Mare*, 2 D. J. & S. 74. In this case the failure of the prior gift is due not to lapse merely, since if A. had survived the testator the gift to him would not have been indefeasible until he had attained twenty-one.

2. If A. dies over twenty-one in the testator's lifetime, the gift over does not take effect. *Williams v. Chitty*, 3 Ves. 545 ; *Doo v. Brabant*, 3 B. C. C. 393 ; 4 T. R. 706 ; *Humberstone v. Stanton*, 1 V. & B. 385 ; *McCarthy v. McCarthy*, 3 L. R. Ir. 317.

In this case since A., if he had survived, would have taken an indefeasible interest, the failure of the gift to him is due to lapse only, which the testator cannot be supposed to have contemplated, and the event on which alone there is a bequest to the claimant has not occurred.

Where, however, the prior gift is to a class, the following rules may be laid down ; suppose a gift to children as a class, followed by a gift over, if they die under twenty-one :—

1. If the contemplated class never comes into existence, the gift over takes effect on the principle already stated, *ante*: *Jones v. Westcomb*, 1 Eq. Ab. 245, pl. 10 ; *Mackinnon v. Sewell*, 2 M. & K. 202. In these cases the condition is more than fulfilled, since the events that have happened include the condition upon which the property is given over.

2. If members of the class come into existence, but die under twenty-one in the testator's lifetime. In this case, too, it seems the gift over will take effect, and the same arguments would apply as to the previous case, with the additional argument that the condition is in fact literally fulfilled. It is not by reason of

Chap.
XXXVIII.

lapse that the gift over takes effect, since if the legatees in question had survived the testator, the gift over would still have held good in the events that have happened. See *Brookman v. Smith*, L. R. 6 Ex. p. 303; *Mackinnon v. Peach*, 2 Kee. 555; but see *Greated v. Greated*, 26 B. 621.

3. If members of the class come into existence, survive twenty-one, and die in the testator's lifetime, the gift over will not take effect: *Tar buck v. Tar buck*, 4 L. J. Ch. 129; *Brookman v. Smith*, L. R. 6 Ex. 291; *ib.* 7 Ex. 271; or, to state the rule more generally, if all conditions are fulfilled which would entitle those taking under the prior gift to indefeasible interests, supposing they had survived the testator, if, in other words, the failure of the prior gift is due to lapse and lapse only, the gift over does not take effect.

If all die before the testator, but not under 21.

V. GIFTS OVER UPON DEATH TREATED AS A CONTINGENT EVENT.

1. If there is an immediate gift to A., and a gift over in case of his death, or any similar expression implying the death to be a contingent event, the gift over will take effect only in the event of A.'s death before the testator. *Lord Bindon v. Earl of Suffolk*, 1 P. W. 96; *Turner v. Moor*, 6 Ves. 556; *Cambridge v. Rous*, 8 Ves. 12; *Crigan v. Baines*, 7 Sim. 40; *Taylor v. Stainton*, 2 Jur. N. S. 634; *Ingham v. Ingham*, I. R. 11 Eq. 101; *In re Neary's Estate*, 7 L. R. Ir. 311; *Elliot v. Smith*, 22 Ch. D. 236; *In re Bourke's Trusts*, 27 L. R. Ir. 573; see *Watson v. Watson*, 7 P. D. 10.

Gift over in case of the legatee's death.

This rule applies though the gift over may be to persons "then living," or to survivors. *Trotter v. Williams*, Prec. Ch. 78; *King v. Taylor*, 5 Ves. 806.

So, too, a gift to several, with a gift over in case of the death of either in the lifetime of the others or other, was confined to death before the testator, the death of one before the other being a certain and not a contingent event. *Howard v. Howard*, 21 B. 550.

It makes no difference that the gift in case of A.'s death is to
T.W. M M

Chap.
XXXVIII.

his children. *Slade v. Milner*, 4 Mad. 144; *Schenck v. Agnew*, 4 K. & J. 405.

And this construction has been adopted where the gift over was "in case of his decease or at his decease." *Arthur v. Hughes*, 4 B. 506.

Gift over at
the legatee's
death.

But, as a rule, when there is a gift to A. indefinitely, followed by a gift at his decease, A. will take only a life interest. *Constable v. Bull*, 3 De G. & S. 411; *Waters v. Waters*, 26 L.J. Ch. 624; *Adams' Trust*, 14 W. R. 18; *Joslin v. Hammond*, 3 M. & K. 110; *Reid v. Reid*, 25 B. 469; *Bibbens v. Potter*, 10 Ch. D. 733; *Re Houghton*; *Houghton v. Brown*, 50 L.T. 529.

General in-
tention that
the gift was
to take effect
after A.'s
death.

2. A gift over "in case of the death of A." has been construed as equivalent to "after his death" in the following cases:—

a. Where the gift is only of a life interest, and the remainder would otherwise be undisposed of. *Smart v. Clark*, 3 Russ. 365; *Tilson v. Jones*, 1 R. & M. 553; *Ingham v. Ingham*, 1 R. 11 Eq. 101.

b. Where the testator has given the absolute interest in another legacy in express terms, or has shown an intention to provide in all events for the person to take "in case of the death of A.," or has expressly provided for the death of the legatee in his lifetime with regard to another legacy to the same legatee, there is ground for arguing that the gift over in case of the death of A. was to take effect upon his death at any time. *Billings v. Sandom*, 1 B. C. C. 393; *Nowlan v. Nelligan*, 1 B. C. C. 489; *Douglas v. Chalmer*, 2 Ves. Jun. 501.

c. So a direction in the event of A.'s death to *continue* her annuity for the benefit of her children will not be construed as providing only against lapse. *Wilkins v. Jodrell*, 13 Ch. D. 564.

Gift over in
case of the
legatee's
death after a
life interest.

3. If the gift is after a life estate, or a time is appointed for payment, the words "in case of death" refer to death at any time before the vesting in possession, whether before or after the testator. *Hervey v. M'Laughlin*, 1 Pr. 264; *Johnson v. Antrobus*, 21 B. 556; *Bolitho v. Hillyar*, 34 B. 180; and see *James v. Baker*, 8 Jur. 750.

It appears that a gift after a life interest to executors for

their trouble, with a gift over in case of death, would *prima facie* mean death before the testator. *Green v. Barrow*, 10 Ha. 459.

Chap.
XXXVIII.

4. In the case of realty a devise to A. simply in a will before the Wills Act, and in case of his death over, would perhaps be construed as to A. for life, and after his death over. *Bowen v. Scowcroft*, 2 Y. & C. Ex. 640 ; see, however, *Wright v. Stephens*, 4 B. & Ald. 574.

Gift over of
realty in case
of the death
of the devisee.

On the other hand, if the devise gives A. the fee, a gift over, in case of A.'s death, will be held to refer to his death before the testator. *Rogers v. Rogers*, 7 W. R. 541.

VI. GIFTS OVER UPON DEATH COUPLED WITH A CONTINGENCY.

Sect. 10 of the Conveyancing Act, 1882 (45 & 46 Vict. c. 39), enacts that "where there is a person entitled to land for an estate in fee, or for a term of years absolute or determinable on life, or for term of life, with an executory limitation over on default or failure of all or any of his issue, whether within or at any specified period or time or not, that executory limitation shall be or become void and incapable of taking effect, if and as soon as there is living any issue who has attained the age of twenty-one years, of the class on default or failure whereof the limitation over was to take effect."

Conveyancing
Act, 1882,
section 10.

The section applies where the executory limitation is contained in an instrument coming into operation after the 31st December, 1882. It will be noticed that the section is limited to land.

In cases where the Act does not apply the following rules are deducible from the cases :

If there is an immediate gift to A., and if he dies without issue over, the gift over takes effect upon the death of A. without issue at any time, whether before or after the testator. *Farthing v. Allen*, 2 Mad. 310 ; 2 Jarm. 1596 ; *Smith v. Stewart*, 4 De G. & S. 253 ; *Cotton v. Cotton*, 23 L. J. Ch. 489 ; *Bowers v. Bowers*, 8 Eq. 283 ; 5 Ch. 244 ; *Else v. Else*, 13 Eq. 196 ; *Varley v. Winn*, 2 K. & J. 705 ; *Woodroffe v. Woodroffe*, (1894) 1 L. R. 299.

Gift over
upon death
without issue
is not con-
fined to death
before the
testator.

Chap.
XXXVIII.

The fourth
rule in
Edwards v.
Edwards is
overruled.

Similarly, if the gift is future, as to A. for life and then to B., and if B. dies without issue over, the gift over will take effect upon the death of B. at any time without issue, whether before or after the death of the tenant for life. *O'Mahoney v. Burdett*, L. R. 7 H. L. 388; *Ingram v. Soutten*, *ib.* 408; overruling the so-called fourth rule in *Edwards v. Edwards*, 15 B. 357.

And similarly, a direction to settle a legacy upon marriage is *prima facie* not restricted to marriage in the lifetime of a tenant for life. *Witham v. Witham*, 3 D. F. & J. 758; see *Davies v. Davies*, 50 L. J. Ch. 623, where the bequest was immediate and the direction restricted to a year from the death.

In what cases
the period of
defeasibility
will be
limited.

There may, however, be circumstances in the will limiting the defeasibility to some earlier time than the death of the legatee without issue. Some of the cases decided on the authority of *Edwards v. Edwards* are probably not reconcilable with the rule laid down in *Ingram v. Soutten*. See *Allen's Estate*, 3 Dr. 380.

The following rules seem, however, to be admitted in *O'Mahoney v. Burdett*.

Gift over to
survivors.

1. Possibly, where there is a gift over if any members of a class die without issue to the survivors, the gift over must take effect, if at all, before the time when the survivors are to be ascertained.

Thus, if the gift is immediate the gift over may be limited to the happening of the event in the testator's lifetime. *In re Smaling*; *Johnson v. Smaling*, 26 W. R. 231; see *Apsey v. Apsey*, 36 L. T. N. S. 941; a case apparently inconsistent with *Bowers v. Bowers*.

If the gift is, after a life interest, to several, and if any die without issue to the survivors, the gift over may in the same way be limited to death without issue before the tenant for life. See *Clark v. Henry*, 11 Eq. 222; 6 Ch. 588; *Besant v. Cox*, 6 Ch. D. 604.

Where the
donees to take
upon death
without issue
of a prior
legatee are

2. If the fund is vested in trustees who are directed to distribute it at a certain time, so that the trusts then determine, and the legatees who are to take upon the death of prior legatees without issue are contemplated as taking through the

medium of the same trustees, there is *prima facie* reason for restricting the death without issue to death without issue before the period of distribution. *Galland v. Leonard*, 1 Sw. 161; *Wheable v. Withers*, 16 Sim. 505; *Edwards v. Edwards*, 15 B. 357; *Beckton v. Barton*, 27 B. 99; *Dean v. Handley*, 2 H. & M. 635; see *Smith v. Colman*, 25 B. 217; *In re Hayward*; *Creery v. Lingwood*, 19 Ch. D. 470; *In re Luddy*; *Peard v. Morton*, 25 Ch. D. 394; see *Lewin v. Killey*, 13 App. C. 783, P. C.

Chap.
XXXVIII.
contemplated
as taking
through the
medium of a
trust which
determines at
a certain
time.

But words directing payment or distribution at a certain time will not confine the contingency to that time, if the persons to take upon the death without issue of a prior legatee are not treated as taking through the medium of the same payment or distribution. *Gosling v. Townshend*, 17 B. 245; 2 W. R. 23.

3. And if there are no trustees, but payment or division is directed at the death of the tenant for life, and all the subsequent dispositions are made with reference to the same payment or division, the death without issue will be confined to such death before the period of distribution. *Olivant v. Wright*, 1 Ch. D. 346; *Re Thompson to Curzon*, 52 L. T. 498; see *Re Anstice*, 23 B. 135; *Pearman v. Pearman*, 33 B. 394.

When all the
dispositions of
the testator
have reference
to the period
of distribu-
tion.

So, if there is a life tenancy and then a gift to a class to be paid when they respectively attain twenty-one, and if any die without issue to the survivors, to be paid at the same time as the original share, death without issue will be limited to such death under twenty-one. *Re Johnson's Trusts*, 10 L. T. N. S. 455; *Re Hayne's Trusts*, 18 L. T. N. S. 16.

Similarly, if the gift is to A. if living at the death of the tenant for life, and if not, to his children, and if he dies without children over, the ultimate gift over is confined to the lifetime of the tenant for life. *Andrews v. Lord*, 8 W. R. 405; see *Wood v. Wood*, 35 B. 587; *In re Hill's Trusts*, 12 Eq. 302.

4. When there is a direction that a legatee is to have the absolute control of her legacy at a particular time, a subsequent gift over will be limited to take effect before that time. *Clark v. Henry*, 11 Eq. 222; 6 Ch. 588.

When the
legatee is to
have the
absolute
control at a
certain time.

Chap.
XXXVIII

When gifts over subsequent to the gift over upon death without issue are expressly limited within a certain time.

Gifts over in several events one of which must happen, after prior gift with words of limitation or benefit.

General intention to give the legatees indefeasible interests at a certain time.

5. If there is a gift over upon death without issue before a given time of all the legatees whose shares have previously been given over upon death leaving issue indefinitely, or if the gift to the persons who are to take upon death of the prior legatees without issue is again given over upon the death of such persons before a certain time, there is a strong argument for restraining the prior gifts over to death of the prior legatees without issue before the same time. *Re Hayes' Will*, 9 Jur. N. S. 1068; *Re Sarjeant*, 11 W. R. 203; *Da Costa v. Keir*, 3 Russ. 360; see *Doe d. Lifford v. Sparrow*, 13 East, 359; *Lloyd v. Davies*, 15 C. B. 76.

6. If the gift is followed by words of limitation or benefit, as "to A., his heirs, and assigns," or "to A. for ever," or "to A. for his own use and benefit," and the property is then given over upon contingencies, one or other of which must happen; as, for instance, upon death either with or without children, the defeasibility will be limited by the period of distribution, whether it is the testator's death or some other time, in order not to cut down the previous absolute interests to life interests merely. *Doe v. Sparrow*, 13 East, 359; *Clayton v. Lowe*, 5 B. & Ald. 636; *Gee v. Corporation of Manchester*, 17 Q. B. 737; *Woodburne v. Woodburne*, 23 L. J. Ch. 336; *Da Costa v. Keir*, 3 Russ. 360; *Slaney v. Slaney*, 33 B. 631.

If, however, the gift is merely in general words without any express indication that it is intended to be absolute, the fact that the contingencies upon which the property is given over in effect reduce the interest to a life interest, will not have the effect of confining the happening of the contingencies to the period of distribution. *Gosling v. Townshend*, 2 W. R. 23; *Cooper v. Cooper*, 1 K. & J. 658; *Bowers v. Bowers*, 8 Eq. 283; 5 Ch. 244.

7. It is not, however, necessary in order to limit the defeasibility that the gifts over should be upon contingencies, one or other of which must occur, so as to cut down the prior interest to a life estate, unless the defeasibility is limited.

In *Clayton v. Lowe*, *Gee v. Mayor of Manchester*, and *Woodburne v. Woodburne*, *supra*, the interest of the surviving legatee would not necessarily have been reduced to a life estate,

and if it is once clear that the legatee is to take an absolute interest, a gift over in one event is as inconsistent with that absolute interest as a gift over in several, one of which must occur.

And accordingly, where the intention to give indefeasible interests at a particular time is clear, the gift over upon a single contingency, as upon death without issue, will be limited to death without issue before that time. *Brotherton v. Burry*, 18 B. 65; *Ware v. Watson*, 7 D. M. & G. 248; *Re Anstice*, 23 B. 135; *Clark v. Henry*, 11 Eq. 222; 6 Ch. 588; perhaps *Barker v. Cocks*, 6 B. 92, and *Davenport v. Bishopp*, 2 Y. & C. C. 463, come under this head.

8. If the gift is contingent, as to A. at twenty-one, there is some reason for restricting a gift over upon death coupled with a contingency to such death under twenty-one.

Gift over upon death leaving children after a contingent gift.

It seems clear that this construction would be adopted if the gift over is upon the death of A. leaving children to his children, in order to provide for the children of A., if he dies under twenty-one leaving children. *Home v. Pillans*, 2 M. & K. 15.

It seems the same would be the case if the person to take under the gift is the widow of the legatee. *Randfield v. Randfield*, 8 H. L. 225.

The gift over upon death without issue cannot, however, be restricted to the time of vesting, where there is an express gift over upon death merely, before the time of vesting. *Martineau v. Rogers*, 8 D. M. & G. 328.

Whether the defeasibility would be limited where the gift over is to strangers is more doubtful. See *Andrews v. Lord*, 6 Jur. N. S. 865; and see *Dowling's Trusts*, 14 Eq. 463; *Smith v. Spencer*, 6 D. M. & G. 631.

9. If what is given over is the share the legatee would have taken, this confines the gift over to the testator's lifetime. *In re Hayward*; *Creery v. Lingwood*, 19 Ch. D. 470.

Gift over of share legatee would have taken.

10. Where there is a gift to two persons, and if either dies under twenty-one without issue to the survivor, and if both die without issue over, the defeasibility will be restricted to the age of twenty-one. *Kirkpatrick v. Kilpatrick*, 13 Ves. 476;

Ultimate gift over upon death without issue restricted by prior gift.

Chap.
XXXVIII.

Gift over
upon marriage
without con-
sent confined
to marriage
under 21.

Thackeray v. Hampson, 2 S. & St. 214; see *Else v. Else*, 13 Eq. 196.

11. When there is a gift at twenty-one, or upon marriage with consent, a gift over upon marriage without consent has been confined to the age of twenty-one. *Desbody v. Boyville*, 2 P. W. 547; *Knapp v. Noyes*, Amb. 662; *Osborn v. Brown*, 5 Ves. 527; *West v. West*, 4 Giff. 198; *Duggan v. Kelly*, 10 Ir. Eq. 473.

12. It may be noticed that where there is a gift to several, and in case of the death of any to the survivors, and if they die without children over, the gift, in case of death, will not be extended to mean death at any time, nor will the gift upon death without children be confined to such death in the lifetime of the testator. *Clarke v. Lubbock*, 1 Y. & C. C. 492; *Child v. Giblett*, 3 M. & K. 71.

VII. ACCRUED SHARES.

Effect of gifts
over on
accrued
shares.

Clauses in a will disposing of the shares of devisees or legatees dying before a given period or event do not, in the absence of a distinct evidence of intention, extend to shares which have once accrued under those clauses so as to pass them a second time. *Ex parte West*, 1 B. C. C. 575; *Melsom v. Giles*, L. R. 5 C. P. 614; 6 C. P. 532; 6 H. L. 24.

Therefore accrued shares will not pass under the word "share" or "portion." *Cambridge v. Rous*, 25 B. 416; *Bright v. Rowe*, 3 M. & K. 316.

But accrued shares will go with original shares if there is an intention expressed that they should do so.

Accrued
shares di-
rected to go
as original
shares.

1. If, for instance, accrued shares are directed to go in the same manner as original shares. *Cursham v. Newland*, 2 B. 145; *Milsom v. Awdry*, 5 Ves. 465; *Eyre v. Marsden*, 4 My. & Cr. 231; *Melsom v. Giles*, L. R. 6 H. L. 24.

Consolidation
of original
and accrued
shares.

2. And when original and accrued shares have once been consolidated by a direction, for instance, that they are to go in the same manner, "there is no occasion to carry on any separate account of the original share from the accrued share," and both

will pass under the word "share." *Re Hutchinson*, 5 De G & S. 681.

Chap.
XXXVIII.

3. If "his or her share or shares" are spoken of where only one original share has been previously given, so that the words cannot be satisfied *reddendo singula singulis*, as might be the case if the words were "his, her, or their, share or shares," accrued shares will be carried over. *Wilmott v. Flewitt*, 13 W. R. 856; *In re Chaston*; *Chaston v. Seago*, 18 Ch. D. 218.

Words applicable to accrued shares.

And, apparently, "share and shares and interest" would carry accrued shares. *Douglas v. Andrews*, 14 B. 347.

4. Accrued shares will pass where the testator, though he speaks of individual shares, yet shows that he looks on the fund as existing at the period of distribution as an aggregate and previously undivided fund by speaking of it, for instance, as the trust fund. *Worlidge v. Churchill*, 3 B. C. C. 465; *Leeming v. Sherratt*, 2 Ha. 14; *Sillick v. Booth*, 1 Y. & C. C. 121, 739; *Barker v. Lea*, T. & R. 413.

Where the fund is treated as an aggregate fund.

So, where the whole fund is given to a class, with benefit of survivorship, the words of survivorship apply to the whole, accrued as well as original shares. *In re Crawhall's Trusts*, 2 Jur. N. S. 892.

5. And a gift over of the whole is convincing evidence of the same intention. In such a case "share must have been meant to include every interest accruing as well as original, for otherwise the estate would go away from the issue piecemeal; whereas, it is obvious, nothing was intended to go over, but that all should go over at once on failure of the issue of all the children, as if all but one had died without issue who was intended to take all." *Doe d. Clift v. Birkhead*, 4 Ex. 110; *Douglas v. Andrews*, 14 B. 347; *Dutton v. Crowdy*, 33 B. 272; *Langley v. Langley*, 6 L. R. Ir. 277; see *Sutton v. Sutton*, 30 L. R. Ir. 251.

Gift over of the whole fund.

6. And if the bequest is of residue, the presumption against intestacy will assist the Court in passing accrued with original shares. *Goodman v. Goodman*, 1 De G. & S. 695.

Where the gift is residuary.

7. Accrued shares are similarly not liable to the same restrictions as original shares in the absence of a clearly expressed intention so to restrict them. *Gibbons v. Langdon*, 6

Accrued shares are *prima facie* not subject

Chap.
XXXVIII.
to the restriction
of original
shares.

Appointment
of share.

Repeated
operation of
gifts over.

Sim. 260 ; *Ware v. Watson*, 7 D. M. & G. 248 ; and, on the other hand, *Trickey v. Trickey*, 3 M. & K. 560 ; *Jarman's Trusts*, L. R. 1 Eq. 71 ; *Fitzgerald v. Fitzgerald*, I. R. 7 Eq. 436.

8. An appointment under a power by a tenant for life of his share may operate as well upon his accrued as his original share. *Re Denton* ; *Bannerman v. Toosey*, 63 L. T. 105.

9. As to the repeated operation of cross limitations, see *Atkinson v. Jones*, Joh. 246.

CHAPTER XXXIX.

SUBSTITUTION.

EVERY executory limitation intended to destroy prior interests in certain contingencies is in the widest sense substitutional. The term is, however, generally applied to limitations intended to provide for the death of prior legatees before the period of distribution.

The simplest form of substitutional gift, introduced by the word "or," as, for instance, to class A. or class B., generally involves the relation of greater to smaller class, or of ancestor to descendant.

It is, however, probable that a simple gift to A. or B. would now be considered substitutional. See *Carey v. Carey*, 6 Ir. Ch. 255; see, however, *Longmore v. Broom*, 7 Ves. 128; *Miller v. Chapman*, 24 L. J. Ch. 409; *Maude v. Maude*, 22 B. 290.

But a gift to A. or B., or to A. or his children, as C. may appoint, is not substitutional, and in default of appointment it goes among all the appointees equally. *Penny v. Turner*, 2 Ph. 493; *White's Trusts*, Joh. 656.

A gift of £100 a-piece to each of the children, grandchildren, or other descendants of A., includes all the descendants. *Solly v. Solly*, 5 Jur. N. S. 36.

When the contingency of surviving the period of distribution is applied both to the original and substituted class; if, for instance, the gift is to parents or their children living at the decease of the tenant for life, the gift will nevertheless be construed as substitutional. *Congreve v. Palmer*, 16 B. 435; *Atkinson v. Bartrum*, 28 B. 219.

In such a case, however, if there is anything to show that the "Or"

Chap.
XXXX
Substitution
defined.

Whether a
gift to A. or
B. is substitu-
tional.

Gift to A. or
B., as C. may
appoint, is not
substitutional.

Contingency
of surviving
the period of
distribution
applied to
original and
substituted
legatees.

Chap.
XXXX.
changed into
"and."

original and substituted class are to take co-ordinately, "or" will be read "and." *Richardson v. Spraag*, 1 P. W. 433, where the gift was to such of the testatrix's daughters, or daughters' children, as should be living at her son's death, "without considering any superiority or eldership whatever." See *Shand v. Kidd*, 19 B. 310; *In re Cleland's Trusts*, 7 L. R. Ir. 74.

And where the direction was to pay a sum of money after the death of a tenant for life, "to all and every the testatrix's nephews and nieces, to wit, A. or her children, B. or her children," etc., to be equally divided between them, "or" was read "and;" the words under the videlicet being only an expanded description of the persons to take. *Eccard v. Brooke*, 2 Cox, 213.

So, too, where the gift is to such of several persons as should be living at the testatrix's decease, or the issue of such of them as should be married, "or" will be read "and." *Horridge v. Ferguson*, Jac. 583.

Gifts to
persons
"then"
living, or
their issue.

Upon the same principle, a gift to children living at the period of distribution, or *their* issue, will be construed as a gift to children then living, and the issue of those then dead, including issue of those dead at the date of the will, but not, it would seem, of those who were dead before the testator was born. *King v. Cleaveland*, 4 De G. & J. 477; *Philps' Will*, 7 Eq. 151; *Burt v. Hellyar*, 14 Eq. 160; *Wingfield v. Wingfield*, 9 Ch. D. 658; *Keay v. Boulton*, 25 Ch. D. 212.

Substitution
distinguished
from gift over
to take place
at any time.

A substitutional gift, substituting one set of legatees for others dying before the period of distribution, must be distinguished from an executory gift over intended to take effect at any time. Thus, a gift to children living at a particular time, with a gift over, if any *such* children die leaving issue to their issue, is an executory limitation to take effect at any time. *La Roche v. Davies*, 3 Y. & C. Ex. 612, n.; *Ex parte Hunter*, 3 Y. & C. Ex. 610; *Howes v. Herring*, 1 M'Cl. & Y. 295.

On the other hand, if the gift is to children living at the period of distribution, with a gift to their issue if any such children die before becoming entitled, the gift to the issue will be construed as substitutional, since children, living at the period of distribution, could not die without becoming

entitled. *Jeyes v. Savage*, 10 Ch. 555; see *Giles v. Giles*, 8 Sim. 360.

Chap.
XXXX

A substitutional gift must further be distinguished from those cases where after an absolute gift to a class the shares of members of the class are directed to be settled. In these cases if what is settled is only what the member of the class actually becomes entitled to, the gift may fail by his death before the testator. *Stewart v. Jones*, 3 De G. & J. 532; *In re Speakman*; *Unsworth v. Speakman*, 4 Ch. D. 620; *In re Roberts*; *Tarleton v. Bruton*, 27 Ch. D. 346; 30 Ch. D. 234; *Re Pinhorne*; *Moreton v. Hughes*, 70 L. T. 90.

Substitution distinguished from an absolute gift with a direction to settle.

On the other hand, a substitutional gift will take effect, though the original donee dies before the testator.

Thus a direct gift to A. or his children goes to A. if he survives the testator, and to his children if he does not. *Montagu v. Nucella*, 1 Russ. 165; *Salisbury v. Petty*, 3 Ha. 86; *Whitcher v. Penley*, 9 B. 477.

Direct gift to A. or his children.

Similarly, if there is a life interest, and then a gift to A. or his children, the substitutional gift takes effect whether A. dies in the lifetime of the testator or the tenant for life. *Girdlestone v. Doe*, 2 Sim. 225; *Porter's Trusts*, 4 K. & J. 188; *Habergham v. Ridehalgh*, 9 Eq. 395; *Hobgen v. Neale*, 11 Eq. 48; *In re Dawes' Trusts*, 4 Ch. D. 210; *Re Gilbert*; *Daniel v. Matthews*, 54 L. T. 752; 34 W. R. 577; *Re Miles*; *Miles v. Miles*, 61 L. T. 359.

Future gift to A. or his children.

As to the effect of the death of some of the original legatees before the testator:

It is settled that where the gift is to a class of parents, with a substitutional gift to the children of parents dying before the period of distribution, children of parents who die after the date of the will, and before the testator, will take. *Smith v. Smith*, 8 Sim. 353; *Jones v. Frewin*, 12 W. R. 369; 3 N. R. 415; *Re Hotchkiss's Trusts*, 8 Eq. 643; *Habergham v. Ridehalgh*, 9 Eq. 395.

Whether substituted legatees can take for original legatees who die before the testator's death.

Though, of course, if the original gift is to a class living at the testator's death, or at some other period, and the substitutional gift is expressly confined to the children of such persons, the substitution can have no effect with regard to

Case where the original class is confined to persons living at the testator's death

Chap.
XXXX

those who never become members of the original class. See *Shergold v. Bone*, 13 Ves. 370; *Smith v. Farr*, 3 Y. & C. Ex. 328.

Whether there can be substitution in respect of legatees dead at the date of the will :

Where the original gift is to named persons.

1. When there is a gift to several persons *nominatim*, with a substitution of their issue in the event of their death, the fact that one of the persons so named is dead at the date of the will will not prevent his issue from taking. *Hannam v. Simms*, 2 De G. & J. 151; *Ive v. King*, 16 B. 46; *Hobgen v. Neale*, 11 Eq. 48; see *Barnes v. Jennings*, L. R. 2 Eq. 448.

Where the original gift is to a class.

2. If, however, the original gift is to a class, with a substitutional gift to issue, the question is whether the issue take a share which has been given to a parent who is contemplated as capable of taking under the will, or whether they take a share which has not been previously given to their parent. In the former case, issue of parents dead at the date of the will will not take, in the latter they will.

The important point is not whether the gift itself is substitutional, but whether the interests of persons who are contemplated as capable of taking under the will are given in the event of their death to substituted legatees.

When the substituted legatees take original shares.

Thus, though a gift to such of a class as may be then living, or the issue of any then dead, is strictly substitutional, the issue, if they take at all, take original shares, since nothing is given to parents then dead. *Attwood v. Alford*, L. R. 2 Eq. 479.

In the same way a gift to parents "then living," and the issue of those then dead, is a direct substantive gift to the issue. *Smith v. Smith*, 5 Ch. 342; *Martin v. Holgate*, L. R. 1 H. L. 175; see *Ashling v. Knowles*, 3 Dr. 593; *Etches v. Etches*, 3 Dr. 447.

Gift to parents then living, and the issue of those then dead.

a. If the gift is to parents and issue in one continuous sentence—as, for instance, to children then living, and the issue of those then dead—the issue of parents deceased at the date of the will take, though the issue may be directed to take only a parent's share, as this direction will be satisfied by a distribution *per stirpes*. *Tytherleigh v. Harbin*, 6 Sim. 329; *Rust*

v. *Baker*, 8 Sim. 443; *Bebb v. Beckwith*, 2 B. 308; *Coulthurst v. Carter*, 15 B. 421; *Faulding's Trusts*, 26 B. 263; *Philps' Will*, 7 Eq. 151; *Heasman v. Pearse*, 7 Ch. 275.

It seems the issue of a parent who died before the testator was born would not take. *Wingfield v. Wingfield*, 9 Ch. D. 658.

If the gift is to "my children then living, and the children of such of my *said* children as shall be then dead," the testator by using the term "said" children shows that he is contemplating a class of children living at the date of the will, and capable of taking under it, and therefore children of those dead at the date of the will will not be admitted. *Re Thompson's Trust*, 2 W. R. 218; 5 D. M. & G. 280; see *Peel v. Catlow*, 9 Sim. 372; *Smith v. Pepper*, 27 B. 86; *Hall v. Woolley*, 39 L. J. Ch. 106.

Effect of the word "said."

On the other hand, if the gift is to brothers and sisters living at a particular time, and the children of such of the said brothers and sisters as should have died, and the testator has only one brother living at the date of the will, he cannot be referring to a class existing at the date of the will, and children of brothers and sisters dead at the date of the will will be admitted. *Re Jordan's Trust*, 2 N. R. 57; *Giles v. Giles*, 8 Sim. 360; see *Jarvis v. Pond*, 9 Sim. 549.

If the children are expressed to be the children of parents, who are beneficiaries under the will; if, for instance, the bequest is to "my daughters and their children," the children of a daughter dead at the date of the will take nothing. *Parker v. Tootal*, 11 H. L. 143; see *Crook v. Whitley*, 26 L. J. Ch. 350; but see *Clay v. Pennington*, 7 Sim. 370.

Gift to my daughters and their children.

b. When the gift is clearly substitutional, as in the case of a gift to a class or their issue, issue of members of the class dead at the date of the will will not take. *Congreve v. Palmer*, 16 B. 435; *In re Webster's Estate*; *Widgen v. Mello*, 28 Ch. D. 737. The principle seems to have been admitted in *In re Sibley's Trusts*, 5 Ch. D. 494.

When the gift is substitutional in the simplest form.

If there is anything to assist the construction, issue of members of the class dead at the date of the will may be let in. Thus, if none of the members of the original class are alive at the date

Where such of the original legatees as are alive at the

Chap.
XXXX
date of the
will do not
satisfy the
words of gift.

Gift to the
substituted
legatees in an
independent
sentence.

Direction
that the
legacy of a
parent should
go to his
children

Issue to stand
in the place
of their
parents.

Issue to take
the share
their parents

of the will, or if the original class is brothers and sisters, and the testator has only one brother living at the date of the will, children of those then dead will come in. *Gowling v. Thompson*, 11 Eq. 366; see *Barnaby v. Tassell*, 11 Eq. 363; *Jarvis v. Pond*, 9 Sim. 549; *In re Sibley's Trusts*, 5 Ch. D. 494; *Walsh v. Blayney*, 21 L. R. Ir. 140.

c. Where the gift to the issue is in an independent clause, the question is whether the intention is to add fresh members to or substitute them for the original class.

If the gift is to children living at the testator's death, with a direction that if any should happen to die in his lifetime, the "legacy" intended for such child should be for his issue, the word "legacy" shows that the testator meant to substitute only issue of parents who at the date of the will were capable of taking. *Christopherson v. Naylor*, 1 Mer. 320; *Hunter v. Cheshire*, 8 Ch. 751. It may be doubted whether *Phillips v. Phillips*, 13 W. R. 170; 10 Jur. N. S. 1173; and *Parsons v. Gulliford*, 10 Jur. N. S. 231, can stand with these authorities.

The same rule applies if there is no direct gift to issue, but only a direction that issue of parents dying are to stand in the place of their parents, or to take their parents' share. *Butter v. Ommaney*, 4 Russ. 71; *Gray v. Garman*, 2 Ha. 268; *Atkinson v. Atkinson*, 1 R. 6 Eq. 184; *Re Hotchkiss's Trusts*, 8 Eq. 643; *Habergham v. Ridehalgh*, 9 Eq. 395; *Kelsey v. Ellis*, 38 L. T. N. S. 471; *In re Barker*; *Asquith v. Saville*, 47 L. T. 38; *In re Chinery*; *Chinery v. Hill*, 39 Ch. D. 614; *In re Musther*; *Groves v. Musther*, 43 Ch. D. 569; *In re Brown*; *Brown v. Brown*, 58 L. J. Ch. 420; 37 W. R. 472; see *In re Wood*; *Tullett v. Colville*, (1894) 3 Ch. 381.

Where the gift was to such of the children of the testator's sisters as should survive the tenant for life, followed by a direction that in case any of such children should be dead at the testator's decease leaving issue, such issue should take the share of their deceased parent, the issue of a child dead at the date of the will was not included. *West v. Orr*, 8 Ch. D. 60; see *Giles v. Giles*, 8 Sim. 360.

On the other hand, if the original gift is to a class, with a direction, that the issue of any dying in the testator's lifetime,

or before the period of distribution, should take the share their parents would have been entitled to if then living, the issue of those dead at the date of the will will be admitted, as the direction amounts to an independent gift, the word share being satisfied by a distribution *per stirpes*. *Loring v. Thomas*, 1 Dr. & S. 497; *Chapman's Will*, 32 B. 382; *Adams v. Adams*, 14 Eq. 246; *In re Lucas' Will*, 17 Ch. D. 788.

Chap.
XXXX
would have
been entitled
to if living.

This rule has been applied where the original gift was to a class living at the death of the tenant for life. *In re Woolrich*; *Harris v. Harris*, 48 L. J. Ch. 321; 11 Ch. D. 663.

In these cases it is not the share of the parents, or the share the parents are entitled to, which is given to the issue, but the share the parents would have been entitled to. *In re Potter's Trusts*, 8 Eq. 52, is a more difficult case, since there the gift was to nephews and nieces, and in case of the death of any of his *said* nephews and nieces leaving issue, such issue to take the share their parents would have taken if living, the word *said* showing that the testator referred to nephews and nieces capable of taking under the will. See *Re Thompson's Trust*, 2 W. R. 218; 5 D. M. & G. 280.

Perhaps issue of parents dead at the date of the will would not be admitted where other express provision is made for such issue. *Waugh v. Waugh*, 2 M. & K. 41.

Whether the contingency of the original gift attaches to the substituted gift:

When there is a life interest followed by a contingent gift to certain persons, and a gift if they die before the contingency to their children, the contingency attaching to the gift to the parents does not attach to that to the children, and the children take vested interests, although they may not survive the contingency upon which the gift to the parents was to take effect. For instance, if the bequest is to A. for life, then to such of my nephews as may be then living, and the children of such as may be then dead, the children take vested interests upon their parents' death, whether they survive A. or not.

Contingency
attaching to
original
legatees does
not attach to
substituted
legatees.

1. This is clearly settled if the children take original shares. *Martin v. Holgate*, L. R. 1 H. L. 175; *Re Orton's Trust*, 3 Eq. 375; *Burt v. Hellyar*, 14 Eq. 160.

Where the
substituted
legatees take
original
shares.

Chap.
XXXX.
Whether rule
is the same
with substitu-
tional gifts.

2. But if the gift to the children is substitutional there appears to be some difficulty. On the whole, the current of recent authority seems to be in favour of the same rule in the case of substitutional as of original gifts. *Masters v. Scales*, 13 B. 60; *Re Turner*, 34 L. J. Ch. 660; *Lanphier v. Buck*, 2 Dr. & Sm. 484; *Merrick's Trusts*, L. R. 1 Eq. 551; *Re Flower*; *Matheson v. Goodwyn*, 62 L. T. 677.

But a difficulty is created by the case of *Pearson v. Stephen*, in the House of Lords, 5 Bl. N. S. 203. There there was a gift to S. during coverture, and upon the death of her husband in her life to her absolutely, but if her husband should survive her, then to the testator's five sons and their respective issue *per stirpes* and not *per capita*; and it was held that in the event of S. dying in her husband's life, the sons of the testator living at such event would be absolutely entitled, but if any of the sons should die in the lifetime of S. leaving issue, such issue, if living at the death of S., would be entitled to the share their parents would have taken; but see the remarks of Kindersley, V.-C., on this case in *Lanphier v. Buck*, 34 L. J. Ch. 659.

Substituted
legatees in
order to take
must survive
their ancestor.

3. There is, however, this difference between a substitutional and original gift to the children, that in the former case only those children who survive the parents will take, while in the latter all the children will take, whether they survive the parents or not; but see *Humfrey v. Humfrey*, 2 Dr. & Sm. 129. "The substitution takes place at the death of the nephew or niece. And then I see very good ground for saying there by reason of its being substitution, you will not substitute dead people for the nephew or niece who has been living up to that time and has then just died." *Lanphier v. Buck*, 2 Dr. & Sm. 484; 34 L. J. Ch. 657; *Re Turner*, 34 L. J. Ch. 660; *Merrick's Trusts*, L. R. 1 Eq. 551; *Thompson v. Clive*, 23 B. 282; *Crause v. Cooper*, 1 J. & H. 207; *Bennett's Trusts*, 3 K. & J. 280; *Hurry v. Hurry*, 10 Eq. 346; *Hobgen v. Neale*, 11 Eq. 48; *Heasman v. Pearse*, 11 Eq. 522; 7 Ch. 275; *In re Haskett Smith's Trusts*, 7 Ch. D. 665.

Upon a similar principle, under a gift in certain events to a class and the issue of such of them as shall then be dead,

members of the class dying without issue before the events happen take a share. *In re Wood*; *Moore v. Bailey*, 29 W. R. 171; see *Strother v. Dutton*, 1 De G. & J. 675.

Chap.
XXXX.

Whether the original and substituted class are mutually exclusive :

When the gift is to a class or their issue, the further question arises whether the original and substituted legatees form two mutually exclusive classes, so that no substituted legatees can take if there are any members of the original class to take, or whether the issue of members of the original class dying can take with the surviving members of the original class.

Whether original and substituted legatees can take together.

It is clear that if all the original class survive the period of distribution, they alone take. *Sparks v. Restal*, 24 B. 218; *Margetson v. Hall*, 10 Jur. N. S. 89; 12 W. R. 334.

Where all the original legatees survive.

So, if none of the original class survive the period of distribution, the substituted legatees alone take. *Willis v. Plaskett*, 4 B. 208; *Timins v. Stackhouse*, 27 B. 434; *Bolitho v. Hillyar*, 34 B. 150; *Attwood v. Alford*, L. R. 2 Eq. 479.

Where none of the original legatees survive.

But if some of the original class die leaving children and others survive the period of distribution :

Where some original legatees die.

If the gift is to several persons *nominatim* as tenants in common or their children, those who survive the period of distribution take, together with the children of those who die before it. *Price v. Lockley*, 6 B. 180.

In the same way, in the case of a simple substitutional gift to children or their issue to be divided amongst them in equal shares, the issue of a child dying after the testator and before the period of distribution take with the other children. *Finlason v. Tatlock*, 9 Eq. 258; *Neilson v. Monro*, 27 W. R. 936; *In re Sibley's Trusts*, 5 Ch. D. 494; see *Holland v. Wood*, 11 Eq. 91.

How the class of substituted legatees is to be ascertained, when the gift is to A. for life, then to B. or his issue :—

1. If B. dies in the testator's lifetime, the class is ascertained at the testator's death. *Ive v. King*, 16 B. 46.
2. If B. survives the testator and dies in the lifetime of the tenant for life, the class is ascertained at B.'s

When the class of substituted legatees is to be ascertained.

Chap.
XXXXX

death. *Ive v. King*, 16 B. 46 ; *Hobgen v. Neale*, 11 Eq. 48.

But the class is not to be definitely ascertained at those periods, but will open to let in issue born afterwards and before the period of distribution. *In re Sibley's Trusts*, 5 Ch. D. 494 ; *In re Jones's Estate*, 47 L. J. Ch. 775, overruling on this point *Hobgen v. Neale*, *supra*. See *ante*, p. 270.

CHAPTER XL.

GIFTS TO SURVIVORS.

THE word survivor may be either a word of limitation of an estate, denoting the interest certain persons are to take, or it may denote a class of persons. Chap. XL.

For instance, in a devise to A., B., and C. as tenants in common for life, with benefit of survivorship, the word survivorship refers to the extent of the estate and not to the class of persons, and upon the death of one the remaining tenants in common take the whole estate. *Haddelsey v. Adams*, 22 B. 266; *Taaffe v. Conmee*, 10 H. L. 64; see, however, *Wiley v. Chanteperdrix*, (1894) 1 I. R. 209. Survivor used as a word of limitation of an estate.

The word cannot, of course, be a word of limitation where absolute interests are given. *Maberley v. Strode*, 3 Ves. 450; *Foley v. Gallagher*, 2 L. R. Ir. 389.

The word is, however, more usually employed to denote the persons who are to take, and in such cases it must have its natural meaning, which is to outlive; that is to say, to be alive at and after the time of a particular event or death of a particular person, which event or person the other is to survive. *Gee v. Liddell*, L. R. 2 Eq. 341. See, however, *Re Clark's Estate*, 3 D. J. & S. 111, where "survive" was held to mean merely "live after." Meaning of survivor.

It has been held that a divesting clause in favour of survivors will operate in favour of a single survivor. *Hearn v. Baker*, 2 K. & J. 383; *Bowyer v. Currall*, 2 W. R. 328; *Bowyer v. Douglass*, W. N. 1876, 279.

WHERE SURVIVORS WILL BE READ OTHERS.

1. If there is an absolute gift to several persons, with a gift Gift to

Chap. XI.

several, and if any die without issue, to the survivors.

Gifts to be paid at 21, with a gift over if all die under 21.

to the survivors, if any die without issue, survivors must be construed in its ordinary sense. *Crowder v. Stone*, 3 Russ. 217; *Ranelagh v. Ranelagh*, 2 M. & K. 441; *Stead v. Platt*, 18 B. 50; *Greenwood v. Percy*, 26 B. 572.

2. Where there is a gift over to take place only in case the event on which the property is limited to the first legatees, among whom there is to be survivorship, happens in respect of all the legatees, survivor will be construed other, so as not to cause an intestacy. For instance, if the bequests are to A., B., and C., payable at twenty-one, and if either die under twenty-one, his share to the survivor, and if two die under twenty-one, the whole to the survivor, and if all die under twenty-one, then over, the share of one dying under twenty-one would go to one who had predeceased him but attained twenty-one and to the survivor equally. *Wilmot v. Wilmot*, 8 Ves. 10; *In re Jackson's Trust*, 14 Ir. Ch. 472. The same construction was adopted in *In re Connellan's Trust*, 16 Ir. Ch. 524, though there was no gift over, but *quære*.

In these cases the testator intends the property to go over as a whole, or not at all. As the whole cannot go over where the event does not happen in respect of all the first legatees, there is no other disposition of the shares in respect of which it happens except among the first legatees themselves, and, in order to allow them to take, the word survivor must be read other.

Survivorship between tenants in tail referred to the *stirpes*.

3. Where there is a devise to sons and the heirs of their bodies, and if any die without issue to the survivors and the heirs of their bodies, and if all die without issue over, survivorship will be referred to the *stirpes* and not to the first takers, and the share of a son dying without issue will go among the issue of a son previously deceased and the surviving sons. *Doe v. Wainewright*, 5 T. R. 427; *Smith v. Osborne*, 6 H. L. 376; see *Askew v. Askew*, 57 L. J. Ch. 629; 58 L. T. 472; 36 W. R. 620; *King v. Frost*, 15 App. C. 548, P. C.

In such cases the testator has expressed his intention of benefiting the line of issue, and the survivorship contemplated is one between the respective *stirpes* and not between the first takers merely, and this, coupled with the gift over, which can

only take effect if all the sons die without issue, is sufficient to enlarge the meaning of the word survivor. Chap. XL.

It is immaterial whether the word is survivors or such as survive. *In re Tharp's Estate*, 1 D. J. & S. 453.

And the same construction will be adopted even if there is no gift over to interpret the testator's intention. *Harman v. Dickenson*, 1 B. C. C. 91, see 34 B. 352; *Williams v. James*, 20 W. R. 1010; *Tufnell v. Borrell*, 20 Eq. 194. Gift over is not material.

4. The same will be the case where the will gives life estates with limitations expressly to issue, followed by a gift on failure of issue of any of the tenants for life to the surviving tenants for life for their lives and then to their issue, and an ultimate gift over on failure of issue of all the tenants for life; and it makes no difference whether the gift be to survivors for life and then to their issue, or to survivors in like manner as the original shares were given. *Lowe v. Land*, 1 Jur. 377; *In re Keep's Will*, 32 B. 122; *In re Tharp's Estate*, 1 D. J. & S. 453; *Holland v. Allsop*, 29 B. 498; *Hurry v. Morgan*, L. R. 3 Eq. 152; *Badger v. Gregory*, 8 Eq. 78; *Waite v. Littlewood*, 8 Ch. 70; *In re Palmer's Trusts*, 19 Eq. 320; *Wake v. Varah*, 2 Ch. D. 348; *In re Row's Estate*, 43 L. J. Ch. 347. Gifts for life remainder to issue, and if any die without issue, to the survivors for life, and then to their issue.

There is here the same evidence of intention to benefit the issue, and the gift over shows that survivorship is contemplated, not merely between the first takers, but between the respective stirpes.

5. It is the gift over which "supplies the necessary clue." *Wake v. Varah*, 2 Ch. D. p. 355. Whether gift over necessary.

In *Wake v. Varah* the attention of the court was not called to the cases in which a gift over has been held to be immaterial. *Hodge v. Foote*, 34 B. 349; *Re Beck's Trusts*, 16 W. R. 189; 37 L. J. Ch. 233; *In re Arnold's Trusts*, 10 Eq. 252; followed in *In re Walker*; *Church v. Tyacke*, 12 Ch. D. 205; see *In re Bowman*; *In re Lay*; *Whytehead v. Boulton*, 41 Ch. D. 525.

But it must now be taken to be settled that in the cases above mentioned survivors is not to be read others unless there is a gift over or some other sufficient evidence of intention to assist the construction. *Wake v. Varah*, *supra*; *Beckwith v. Beckwith*, 46 L. J. Ch. 97; *In re Horner's Estate*; *Pomfret v.*

Chap. XI.

Graham, 19 Ch. D. 186; *In re Dunlevy's Trusts*, 9 L. R. Ir. 349; *In re Benn*; *Benn v. Benn*, 29 Ch. D. 839; see *King v. Frost*, 15 App. C. 548, P. C.

Re Corbett's Trusts, Johns. 591, may be supported on the ground that the testator expressly provided for the surviving issue of the children of the tenants for life, thus excluding an intention of also providing for children of tenants for life dying before the period of accruer, besides which the case was one in which absolute gifts were subsequently cut down by settlement.

"Others surviving."

In *Beckwith v. Beckwith* the gift was to "other daughters surviving," so that to give surviving the meaning other would in effect have been to reject the word entirely.

Effect of gift over after the death of the survivor.

If accruing shares are given to the survivors or survivor for their joint lives, and after the decease of the survivor to the children of the survivors or survivor, the surviving tenant for life will take the whole for life, though probably the children of predeceasing tenants for life would take on his death. *Winter-ton v. Crawford*, 1 R. & M. 407.

When the gift to survivors is not subject to the same limitations as the original gift.

6. If the gift to survivors is not given in the same manner as the original shares, there is no evidence that survivorship by stocks was intended, and the word will be construed strictly.

Thus, where the prior limitations being for life with remainder to children, the gift is to survivors absolutely, and not to survivors for life, and then to their children, although there is a gift over of the whole upon death of all without issue, the intention to benefit the lines of issue is not sufficiently indicated, and survivors will be construed strictly. *Twist v. Herbert*, 28 L. T. N. S. 489.

Survivors must, *à fortiori*, be strictly construed where there is no gift over. *Leeming v. Sherratt*, 2 Ha. 14; *Lee v. Stone*, 1 Ex. 674; *Re Corbett's Trusts*, Johns. 591 (the residuary gift); *Browne v. Rainsford*, 1 R. 1 Eq. 384.

General intention to benefit stirpes.

In such a case, however, there may be a general intention expressed to benefit the *stirpes* and not merely the surviving parents; for instance, by a preliminary statement of intention that the property in question is to be divided among the children of several parents, without any mention of survivorship between the parents. *Hawkins v. Hamerton*, 16 Sim. 410.

7. It seems when the original limitations are for life with remainder to children in tail and if any of the tenants for life die without children to the surviving tenants for life in tail, followed by a gift over in case of a total failure of issue of all the tenants for life, survivorship will not be referred to the stocks. See *Maden v. Taylor*, 45 L. J. Ch. 569; *King v. Frost*, 15 App. C. 548, P. C. See, however, *Cooper v. Macdonald*, 16 Eq. 258.

Chap. XL.

Effect of gift to parents for life, remainder to children in tail, and if any parents die without children to the surviving parents in tail.

8. Where the share of some members of the class are settled and others not, and the gift over is to the survivors of the class in the same way as the original shares, the case is more difficult.

Some shares settled, others not.

In such a case the word survivors was construed others, chiefly by the force of a gift over in default of all the objects intended to be benefited. *Lucena v. Lucena*, 7 Ch. D. 255.

If the gift is to a class of sons and daughters, and the daughters' shares are by a separate clause directed to be settled and given over in default of issue to the surviving sons and daughters in the same way as the original shares, survivors would not be construed as others. *De Garagnol v. Liardet*, 32 B. 608; *Re Usticke*, 35 B. 338; see *Nevill v. Boddam*, 28 B. 554.

Where the shares of daughters are directed to be settled with a gift over if they die without children to the surviving sons and daughters.

On the other hand, if the shares of daughters dying without issue given to surviving members of the class are directed to be for the benefit of the other shares, survivors will be read others, at any rate as regards the settled shares. *Jackson v. Sparks*, 38 L. J. Ch. 75; and see the judgment of the M. R. in *Lucena v. Lucena*, *supra*.

9. Where there was an absolute gift to several, with a gift to their issue if they died leaving issue, and if any died without issue to the survivors, subject to the same executory limitation in favour of issue as the original shares, survivorship has been referred to the *stirpes*, and not merely to the individuals. *Eyre v. Marsden*, 2 Kee. 564; 4 M. & Cr. 231; *Cross v. Maltby*, 20 Eq. 378; see *Le Jeune v. Le Jeune*, 2 Kee. 701.

Gift over to survivors subject to the same defeasibility as the original gift.

But if the gift to survivors is absolute, and not subject to the same defeasibility in favour of issue as the original shares,

Chap. XI.

"Others"
not read
survivors.

survivors must be construed strictly, though there may be a gift over in the event of the death of all the legatees without issue. *Ferguson v. Dunbar*, 3 B. C. C. 468, n.

Under a gift in default of children of a daughter to the others or other of his children by name, equally between them if more than one, the word others will not be read as survivors. *In re Hagen's Trusts*, 46 L. J. Ch. 665; see *In re Chaston*; *Chaston v. Seago*, 17 Ch. D. 218.

Nor under a gift to a son by name and the survivors of the testator's daughters is it necessary that the son should survive in order to take. *In re Bates*, 11 W. R. 768.

AT WHAT PERIOD A CLAUSE OF SURVIVORSHIP CEASES TO OPERATE.

In gifts to survivors two further questions arise; in the first place, when is the class of survivors to be ascertained? in the second place, when do the interests become indefeasible?

The period of
distribution is
the limit of
defeasibility.

1. The general rule is that, when the survivorship is upon death merely, the time of distribution is the limit of defeasibility. "Survivorship is to be referred to the period of division. If there is no previous interest given in the legacy, then the period of division is the death of the testator, and the survivors at his death will take the whole legacy. But if a previous life estate be given, then the period of division is the death of the tenant for life, and the survivors at such death will take the whole legacy." *Cripps v. Woolcott*, 4 Mad. 11; *Stevenson v. Gullan*, 18 B. 590; *Neathway v. Read*, 3 D. M. & G. 18; *Howard v. Collins*, 5 Eq. 349; see *In re Duke*; *Hannah v. Duke*, 16 Ch. D. 112.

This is the case whether the only gift is in the direction to divide, as in *Cripps v. Woolcott*, or whether there is already a prior complete gift independent of that direction. *Hearn v. Baker*, 2 K. & J. 383.

The same rule applies to realty as to personalty. *In re Gregson's Trust Estate*, 2 D. J. & S. 428; *In re Belfast Town Council*; *Ex parte Sayers*, 13 L. R. Ir. 169.

If the tenant for life dies in the lifetime of the testator the survivors are fixed at the testator's death. *Spurrell v. Spurrell*, 11 Ha. 54; *Daniell v. Daniell*, 6 Ves. 297.

a. Thus, in the case of a direct gift to several or the survivors, those who survive the testator take the whole. *Spurrell v. Spurrell*, 11 Ha. 54; 17 Jur. 755. Direct gift to several or the survivors.

If payment is postponed till the age of twenty-one, survivorship refers to that. *Forrester v. Smith*, 2 Ir. Ch. 70; *Vorley v. Richardson*, 8 D. M. & G. 126.

b. If there is a gift for life, followed by a gift to several or the survivors, or by a gift to several, and if any die, to the survivors, those who survive the period of distribution take indefeasibly. *Cripps v. Woolcott*, 4 Mad. 15; *Whitton v. Field*, 9 B. 369; *Naylor v. Robson*, 34 B. 571; *Vorley v. Richardson*, 8 D. M. & G. 126; *Shaw v. Shaw*, 25 L. R. Ir. 30; see *Wordsworth v. Wood*, 1 H. L. 129; see *In re Dawes' Trusts*, 4 Ch. D. 210. Future gift to several or the survivors.

c. In the same way, if there is a gift for life and then to the children of the tenant for life who attain twenty-one and in default of such children to a class of survivors, the survivorship refers to the period when the prior gift fails. *Macdonald v. Bryce*, 16 B. 581; *Carver v. Burgess*, 18 B. 541; 7 D. M. & G. 96; *Taylor v. Beverley*, 1 Coll. 108. Gift upon a contingency to a class of survivors.

d. Upon the same principle, a gift after a life interest to "surviving children" goes to those who survive the tenant for life. *Huffam v. Hubbard*, 16 B. 579; *Stevenson v. Gullan*, 18 B. 590; *Thompson v. Thompson*, 29 B. 654; *Neathway v. Read*, 3 D. M. & G. 18. Gifts to "surviving" children refer to the period of distribution.

So, if there are several life interests followed by a gift to a class of survivors, they are ascertained at the death of the last tenant for life. *Re Fox's Will*, 35 B. 163.

But if the class of survivors are the children of one of the tenants for life, perhaps they would be fixed at the death of their parent. *Drakeford v. Drakeford*, 33 B. 43.

And if after a gift to surviving children there is a limitation giving the shares of such of the said children who die without issue before the tenant for life to survivors, the original limitation to surviving children must refer to those who survive the Contrary intention.

Chap. XL.

testator. *Evans v. Evans*, 25 B. 81; see *Stringer v. Phillips*, 1 Eq. Ab. 293, pl. 11; 1 P. W. 97 n.

2. The ordinary rule may, however, be excluded by the language of the will.

Effect of powers of advancement in limiting survivorship to the testator's death.

Thus, if the testator provides for the children of legatees between whom there is to be survivorship only in case they do not survive him, or gives large powers of making advances during the lifetime of the tenant for life to legatees among whom there is to be survivorship, it may appear that survivors were to be determined at his death. *Rogers v. Towse*, 9 Jur. 575; *Blackmore v. Snee*, 1 De G. & J. 455.

Effect of words of limitation.

And, perhaps, if the gift to survivors is followed by words of limitation, such as executors and administrators or assigns, the argument that personal enjoyment by the survivors was not intended might prevail, and survivorship would be referred to the death of the testator. *Rose d. Vere v. Hill*, 3 Burr. 1881; *Wilson v. Bayly*, 3 B. P. C. 195.

At any rate, this would clearly be the case if the gift is after a life interest to surviving children, or their heirs and assigns, or to them or their heirs, where the substitutional gift shows that vested interests were intended to be taken at the testator's death. *Re Hopkins' Trust*, 2 H. & M. 411; *In re Stannard*; *Stannard v. Burt*, 52 L. J. Ch. 355.

Gifts to be paid at 21, after a life interest, with benefit of survivorship.

3. If there is a life interest and a period of division as well, for instance, a gift to A. for life, then to a class to be paid at twenty-one, with a clause of survivorship, the question is more complicated. In such cases survivorship refers most naturally to the words with which it is placed in immediate connection.

a. Therefore, if the gift is after a life interest to a class to be paid at twenty-one with benefit of survivorship, survivorship refers most naturally to the age of twenty-one just before mentioned. *Tribe v. Newland*, 5 De G. & S. 236; *Knight v. Knight*, 25 B. 111; *Forrester v. Smith*, 2 Ir. Ch. 70; *Berry v. Briant*, 2 Dr. & Sm. 1; *Corneck v. Wadman*, 7 Eq. 80.

Effect of a gift over upon death of all under 21.

This construction is assisted by a gift over upon death of all under twenty-one. *Salisbury v. Lamb*, 1 Ed. 465; Amb. 383;

Bouverie v. Bouverie, 2 Ph. 349; *Alty v. Moss*, 34 L. T. N. S. Chap. XL.
312.

On the other hand, it is rebutted if the gift over is upon death of all before the tenant for life. *Daniell v. Gossett*, 19 B. 478; *Fisher v. Moore*, 1 Jur. N. S. 1011; see, too, *Doe d. Lifford v. Sparrow*, 13 East, 359; *Gummoe v. Howes*, 23 B. 184, 192.

Gift over upon death before the tenant for life.

b. If, however, the direction as to payment is independent of the gift to survivors, the ordinary rule prevails; if, for instance, the gift is to surviving children at twenty-one. *Huffam v. Hubbard*, 16 B. 579; *Pope v. Whitcombe*, 3 Russ. 124; *Crozier v. Fisher*, 4 Russ. 398; *Lill v. Lill*, 23 B. 446; *Daniell v. Gossett*, 19 B. 478.

Where the ordinary rule prevails.

c. In a gift after a life interest to surviving brothers or their issue, surviving was referred to the testator's death. *Shailer v. Groves*, 2 Jarman, 1548.

4. If the gift to survivors is upon death without issue and the bequest is immediate, those surviving the testator would possibly take indefeasibly in the absence of a contrary intention. See *Bowers v. Bowers*, 5 Ch. 244; and the remarks of V.-C. Malins on that case, 11 Eq. 231; and see *ante*, p. 532.

When the gift to survivors is upon death without issue.

And apparently the same rule will apply if there is a life interest. *Ingram v. Soutten*, L. R. 7 H. L. 408.

WHEN THE CLASS OF SURVIVORS IS TO BE ASCERTAINED.

1. In the class of cases last mentioned where the gift is upon death without issue, the survivors are ascertained whenever the event, upon which the shares are given over, occurs. *Leeming v. Sherratt*, 2 Ha. 14; *Nevill v. Boddam*, 28 B. 554; *Maden v. Taylor*, 45 L. J. Ch. 569.

When the gift is upon death without issue, the survivors are ascertained when the event happens.

2. It was at one time held that when interests are given to several persons for life with remainder to their children, and in the event of any of them dying without issue, the shares of those so dying are given to the survivors absolutely, in the event of the last survivor dying without issue, such last survivor would take his share absolutely, but this is now overruled, and if the

Whether the last survivor takes indefeasibly.

Chap. XI.

last survivor dies without issue the share lapses or falls into residue as the case may be. *In re Mortimer*; *Griffiths v. Mortimer*, 52 L. T. 383; 54 L. J. Ch. 414; *Askew v. Askew*, 57 L. J. Ch. 629; 58 L. T. 472; 36 W. R. 620; *King v. Frost*, 15 App. C. 548, P. C.; *Ranelagh v. Ranelagh*, 41 W. R. 549; 3 R. 315, overruling *Maden v. Taylor*, 45 L. J. Ch. 569; *Davidson v. Kimpton*, 18 Ch. D. 213; *In re Roper's Estate*; *Morrell v. Gissing*, 41 Ch. D. 409.

Whether when period of defeasibility limited, survivors are ascertained when event happens, or when shares become indefeasible.

3. In those cases where the period of defeasibility, or the period during which the gift to survivors is to take effect is limited, another difficulty arises with regard to the time at which the class of survivors is to be fixed. The question is whether the shares of those dying go over immediately to survivors, or whether only those can take as survivors who survive the period of defeasibility.

When there is no vested gift.

a. If there is no vested gift, but only a gift to survivors after a life interest, or upon a contingency, there is no difficulty, and the class to take is ascertained at the time of division, or when the contingency happens. *Howard v. Collins*, 5 Eq. 349; *Carver v. Burgess*, 18 B. 541; 7 D. M. & G. 96; *Pritchard's Trusts*, 3 Dr. 163; see *In re Hill to Chapman*, 33 W. R. 410; 53 L. J. Ch. 541.

Divesting gift to survivors upon death merely.

b. When there is a vested gift with a divesting clause in favour of survivors upon death merely, as, for instance, to a class and if any die to the survivors, the class to take will be ascertained at the time when the shares become indefeasible, that is to say, at the time of distribution, so that if there are no survivors at that time the original gifts are not divested. *Cambridge v. Rous*, 25 B. 409.

Gift to survivors if any legatees die before the period of distribution.

c. But when the gift is to a class, with a gift to survivors, if any die before the tenant for life or before the period of distribution, so that no question as to the period of defeasibility can arise:

Direct gift to be paid at 21, and if any die under 21 to the survivors.

(i.) If the gift is direct to be paid at twenty-one and if any die under twenty-one to the survivors as tenants in common, the current of authority seems to show that the share of a legatee dying under twenty-one will go to those who survive him, though such survivors may not survive the period of dis-

tribution, or even the testator where the gift is to individuals, in which latter case the accrued share will lapse. *Ex parte West*, 1 B. C. C. 575; *Rickett v. Guillemard*, 12 Sim. 88; see, too, *Rudge v. Barker*, Ca. t. Talb. 124, and the cases there cited; *Worlidge v. Churchill*, 3 B. C. C. 465; *Pain v. Benson*, 3 Atk. 80; *Sillick v. Booth*, 1 Y. & C. C. 121, 739; *Bardon v. Bardon*, 16 Ir. Ch. 415; see *Wakefield v. Dyott*, 7 W. R. 31; 4 Jur. N. S. 1098.

(ii.) If the gift is after a life interest to several and if any die before the tenant for life to the survivors as tenants in common, it appears to be now settled that survivors means those who survive the tenant for life, and therefore those who survive the tenant for life will take the whole, while, on the other hand, if none survive the tenant for life the prior interests are not divested. *Littlejohns v. Household*, 21 B. 29; *Marriott v. Abell*, 7 Eq. 478; see *Hunter's Trusts*, L. R. 1 Eq. 295. *Bright v. Rowe*, 3 M. & K. 316, if *contra*, must be considered overruled. It may, however, perhaps be classed under the preceding head, as the disposition was not of a fund in possession to a tenant for life with remainder, but of a reversionary fund subject to a prior life interest, to be paid upon its falling in. See, too, *Vorley v. Richardson*, 8 D. M. & G. 126.

Future gift to several, and if any die before the tenant for life, to the survivors.

(iii.) The testator may, however, show that he intended survivorship to be between the legatees, and not to have reference to the period of distribution.

When survivorship will be among the legatees.

If, for instance, the gift is to A. for life, and then to B. and C. equally, and if either die in A.'s life to the survivor of them the said B. and C., *his executors, administrators, or assigns*, there is a strong indication that the survivorship intended was between B. and C., and, therefore, upon B.'s death in A.'s life, C. immediately becomes entitled in remainder to the whole. *White v. Baker*, 2 D. F. & J. 55; see *In re Hill to Chapman*, 53 L. J. Ch. 541; 23 W. R. 410.

d. If the gift is if any die without issue before the period of distribution to survivors, the point seems to be more doubtful.

(i.) If there is a gift in the event of any dying before the period of distribution leaving issue to such issue, and if any die before the period of distribution without issue to the survivors,

Gift to survivors if any legatees die without issue before the period of distribution. When there

Chap. XL.

is a gift to the issue if any die leaving issue.

Original gift to class living at period of distribution.

Where the whole fund is to be divided once for all.

Crowder v. Stone, and *Young v. Robertson*.

since the gift to the issue takes effect upon the death of the parent, survivorship refers to the same point of time, namely, the death of the person dying without issue. *Ive v. King*, 16 B. 46; *Eyre v. Marsden*, 2 Kee. 564; 4 M. & Cr. 231; *Wilmott v. Flewitt*, 13 W. R. 856; 11 Jur. N. S. 828.

(ii.) On the other hand, if the original gift is to a class living at the period of distribution, it seems more natural to refer the survivorship to the same period. *Essex v. Clement*, 30 B. 525.

(iii.) And, perhaps, the same will be the case where the gift is not of the shares of those dying before the period of distribution without issue to survivors, but the whole fund is directed to be divided in the event of any dying before the period of distribution among the survivors, implying that the whole fund is to be kept together till the period of distribution, and then divided among a class of persons capable of personal enjoyment. *Watson v. England*, 15 Sim. 1. See *Re Johnson's Trusts*, 10 L. T. N. S. 455.

(iv.) Where there are none of the indications of intention above mentioned, it seems doubtful what the rule would be. *Crowder v. Stone*, 3 Russ. 217, and *Young v. Robertson*, 4 Macq. 314, appear to be in direct conflict on the point, and the latter being a Scotch case, it is difficult to say how far its authority would be followed, especially as it is in other respects not entirely in harmony with the current of English authority. As far as principle or convenience goes the arguments seem to be fairly balanced.

A gift over upon death without issue means death without issue at any time, in the absence of an indication of intention to limit the period of defeasibility. The class of survivors, therefore, would have to be fixed whenever the contingency happens, and there seems no reason for saying that the mere limiting of the period of defeasibility should introduce a contingency into the bequest to survivors and make the gift of accruing shares conditional upon surviving the period of defeasibility.

The gift over to survivors, being upon death without issue, it is the failure of issue of members of the original class which is the leading motive in the testator's mind, and not death before the period of enjoyment. The share is given to survivors not

because the original members of the class do not live to enjoy it, but because they have no children to benefit. The intention is to benefit not only the original class but their children; whereas, if the survivors are not fixed till the time when the shares become indefeasible, children of such members of the original class as die before that time will take no interest in the shares of those who die without issue, an argument which, as already remarked, becomes conclusive if there is a prior gift to the children of those who die leaving children.

On the other hand, if the shares go over at once, and several die without issue in the lifetime of the tenant for life, the representatives of the longer lived will take more than the representatives of those dying previously, while the representatives of the person dying first will take nothing, and it may be said that this can hardly have been the testator's intention; but he would probably have provided for such a contingency if he had contemplated it, and his omission to do so ought not to affect the construction of the will.

On the whole, however, it must be admitted that the balance of recent authority is in favour of the principle adopted in *Young v. Robertson*. See the opinion of Malins, V.-C., 7 Eq. 483, 484.

e. What the case would be when, the gift being upon failure of issue of any of the legatees to the survivors, the Court limits the period of defeasibility by construction to the lifetime of the tenant for life, there is no authority to show. In such a case it would seem the argument above mentioned in favour of immediate accruer would apply with greater force, as the period of defeasibility is only remotely present to the testator's mind.

Case when
the period of
defeasibility
is construc-
tively
limited

CHAPTER XLI.

THE CONSTRUCTION OF GIFTS OVER.

GIFTS OVER UPON DEATH BEFORE VESTING.

Chap. XLI.

Gift over
upon death
before vesting.

Vesting
primâ facie
refers to
vesting in
interest.

When the
gift over is to
persons living
at the period
of distribu-
tion.

A GIFT over of the share of a legatee who dies before attaining a vested interest takes effect if the legatee dies in the lifetime of the testator, whether under or over the age appointed for vesting. *Re Gaitskell's Trusts*, 15 Eq. 386.

A gift over upon the death of the legatees before attaining a vested interest refers *primâ facie* to death before vesting in interest.

This is the case whether the gift be immediate or in remainder. *Parkin v. Hodgkinson*, 15 Sim. 293 ; *Re Arnold's Estate*, 33 B. 163 ; *Richardson v. Power*, 19 C. B. N. S. 780.

If, however, the gift over be to persons living at the period of distribution, there is a strong argument that the word vested was used as equivalent to vested in possession : *Young v. Robertson*, 4 Macq. 314, where the gift over upon the death of any before attaining a vested interest was to the survivors, which was read as equivalent to those who survive the period of distribution, and *Greenhalgh v. Bates*, L. R. 2 P. & D. 47, where the gift over was to the next of kin of the tenant for life, who could not be ascertained till her death.

So, if the legacies would be vested in interest at the testator's death, and the gift over is, if any of the legatees die during the testator's life, or after his decease, without attaining vested interests, vested must mean vested in possession. *King v. Cullen*, 2 De G. & S. 252.

Vested used

And, in the same way, the testator may show that he used

"vested" in the gift over, as equivalent to "paid," if the gift over is, if any die before their share should be vested as aforesaid, when only directions as to payment have been previously given. *Sillick v. Booth*, 1 Y. & C. C. 121, 126. Chap. XII.
as equivalent
to paid.

If the testator expressly provides for the death of the legatees in his lifetime, a gift over upon death before vesting refers to vesting in possession. *In re Morris*, 5 W. R. 423.

GIFTS OVER UPON DEATH BEFORE PAYMENT.

A. In the case of a direct gift, followed by a gift over, if any of the legatees die before their legacies are payable. Gift over
upon death
before pay-
ment after
an immediate
gift with a
period of
payment.

1. If a period for payment is appointed the gift over takes effect :

a. If the prior legatee dies in the testator's lifetime, whether after the age fixed for payment or not. *Walker v. Main*, 1 J. & W. 1 ; *Gaitskell's Trust*, 15 Eq. 386.

b. If the prior legatee survives the testator, but dies before the time fixed for payment. *Jenkins v. Jenkins*, Belt's Supplement, 264 ; *Rammell v. Gillow*, 9 Jur. 704 ; and see *Woodburne v. Woodburne*, 3 De G. & S. 643.

2. If no time is fixed payable refers to the testator's death. Where no
period for
payment is
appointed.
Rammell v. Gillow, 9 Jur. 704 ; *Collins v. Macpherson*, 2 Sim. 87 ; *Cort v. Winder*, 1 Coll. 320.

B. If there is a life interest, followed by a bequest to certain persons, and a gift over in the event of death before the respective legacies become payable, no time being appointed for division or payment, the gift over takes effect with respect to those legatees who die before the tenant for life. *Crowder v. Stone*, 3 Russ. 217 ; *Creswick v. Gaskell*, 16 B. 577. Gift over
upon death
before pay-
ment where
there is a
life interest.

The word entitled, however, is more easily susceptible of the meaning vested than the word payable, and it will accordingly be taken to mean entitled in right and not in possession, and referred to the death of the testator and not of the tenant for life, if the latter meaning would have the effect of divesting a previously vested gift. *Commissioners of Charitable Donations v. Cotter*, 2 D. & Wal. 615 ; 1 D. & War. 498 ; *Henderson v. Kennicott*, 2 De G. & S. 492 ; *Re Crosland* ;

Meaning of
the word
"entitled."

Chap. XII.

Effect of gift over upon death before payment when there is a life interest and a period of payment.

Craig v. Midgley, 54 L. T. 238. See *Beale v. Connolly*, I R. 8 Eq. 412; *Jopp v. Wood*, 28 B. 53; 2 D. J. & S. 323; but see *In re Noyce*; *Brown v. Rigg*, 31 Ch. D. 75.

C. If there is a life interest as well as a period of payment the question is more complicated.

The most numerous cases on this head have occurred in marriage settlements, where, in addition to the leaning in favour of vesting, the Court is assisted by the legal presumption that the children were intended to be provided for at the time when their portions were wanted, whether they survived the tenant for life or not. See *Emperor v. Rolfe*, 1 Ves. Sen. 208; *Wakefield v. Maffet*, 10 App. C. 422.

The same rules of construction are, however, applicable to wills. At the same time it must be remembered that the tendency of the Court at the present day is to give words their natural meaning, and it is probable that many of the old authorities cited below would not now be followed. See *Leader v. Duffey*, 13 App. C. 294. The cases may be classified under the following heads:—

Effect of the death of the legatee before the testator.

1. If there is a gift to A. for life, followed by a bequest to his children, whether at twenty-one, or payable at twenty-one, with a gift over on death before the legacy is payable, the gift over is good as regards legatees who die in the testator's lifetime, whether under or over twenty-one. *Walker v. Main* 1 J. & W. 1; the share of Mary Main, who it appears had attained twenty-one. See *Gaitskell's Trust*, 15 Eq. 386.

Bequest contingent upon attaining 21 is indefeasible at that age.

2. If there is a gift to A. for life followed by a contingent bequest to his children, as, for instance, to the children at twenty-one, or to be vested at twenty-one, and a gift over in the event of death before the shares are payable, if the word payable were taken in its ordinary meaning as referring to the time at which the money is actually distributable, it would involve the double contingency of surviving the tenant for life and attaining twenty-one, and therefore the Court confines it to the latter, which is the event when the bequest is most likely to be required, and this is the case whether there is provision for the issue of the children or not. *Mendham v. Williams*, L. R. 2 Eq. 396; *Mocatta v. Lindo*, 9 Sim. 56; *Jones*

v. *Jones*, 13 Sim. 561; *Bouverie v. Bouverie*, 2 Ph. 349; *In re Crofton's Trusts*, 7 L. R. Ir. 279; *Wakefield v. Richardson*, 13 L. R. Ir. 17; *S. C. Wakefield v. Maffet*, 10 App. C. 422; *Part-ridge v. Baylis*, 17 Ch. D. 835.

The same will be the case whether the word used is "received" or "receivable:" *West v. Miller*, 6 Eq. 59; *Dodgson's Trust*, 1 Dr. 440; or "entitled in possession," or "entitled to the receipt," or "entitled to payment," or "before they have received or become possessed." *Re Yates' Trust*, 21 L. J. Ch. 281; *Hayward v. James*, 28 B. 523; *Re Williams*, 12 B. 317; *Rammell v. Gillow*, 9 Jur. 704.

3. When the shares of daughters are directed to be vested at twenty-one, or marriage, and there is a gift over, if any of the legatees die before their shares are payable, to their issue, there seems to be some doubt whether it would not be necessary to construe "payable" in its ordinary meaning, since a daughter could not die leaving issue before her share becomes payable if "payable" meant "vested."

Effect of gift over to issue of those dying before the time of payment when the shares are to be vested at marriage.

It seems, however, that if the gift over is simply of the shares of legatees who die before the time of payment, the construction would not be affected by this fact. *Mendham v. Williams*, L. R. 2 Eq. 396.

On the other hand, if the gift over is not simply of their shares, but of the shares to which the parents would have been entitled if living, since the parents would have been entitled to nothing unless they survived the period of vesting, and the daughters could not have had issue without taking vested shares, payable will have its literal meaning. *Day v. Radcliffe*, 3 Ch. D. 654.

Probably, however, *Mendham v. Williams* and *Day v. Radcliffe* cannot stand together.

4. Where the gift to the children is vested at birth and payment only is postponed, and there is no provision for the issue of the children and a gift over in the event of death before the shares become payable: as, for instance, to A. for life and then to his children, to be divided at twenty-one, with a gift over if any die before their shares are payable, in this case payable will be held to mean attaining twenty-one, for

When there is a vested gift to be paid at 21.

Chap. XII.

otherwise the issue of those children would not take who died in the lifetime of the tenant for life over twenty-one. *Hallifax v. Wilson*, 16 Ves. 168; *Walker v. Main*, 1 J. & W. 1; *Salisbury v. Lamb*, 1 Ed. 465; *Re Williams*, 12 B. 317; *Hayward v. James*, 28 B. 523; *Wakefield v. Maffet*, 10 App. C. 422.

The construction will be the same where the issue only of such children are provided for as die under twenty-one. *Mocatta v. Lindo*, 9 Sim. 56.

When the issue of those dying before the period of distribution are provided for in all events.

If, however, there is after a bequest for life a bequest to children vested at their births, and the time of division is alone postponed with provision for the issue of children dying at any time during the life of the tenant for life, and a gift over if they die before the legacies become payable, the word payable will bear its ordinary meaning and refer to the death of the tenant for life.

For instance, if the gift be to A. for life, then to her children, to be transferred to them at twenty-one, and if any die before their shares are payable, leaving issue, to such issue, and if any die before their shares are payable without issue over, since the fund becomes actually payable on the death of the tenant for life, and there is no reason to adopt any other construction in order to favour the issue, who are already provided for, the gift over will be good on the death of the legatees during the life of the tenant for life, though they may have attained twenty-one. *Willmott's Trusts*, 7 Eq. 532; *Chell v. Chell*, 23 W. R. 252.

Effect of the collocation of words upon the construction.

It may, however, be noticed that the construction of payable, as meaning attaining twenty-one, especially in cases under the first head, is materially assisted by such words as "to be paid," or "payable" at twenty-one, and "it is no strain to understand the testator as adverting merely to the age of twenty-one, which he had just before appointed as the period of payment." *Hallifax v. Wilson*, 16 Ves. 168.

When the original gift is contingent upon surviving the tenant for

5. If the death of the tenant for life is the earliest period at which the gift can be payable; if, for instance, the gift is to such as survive the tenant for life, to be paid at twenty-one, with a gift over upon death before the shares become payable;

the word payable would in all probability receive its ordinary meaning and be referred to the period of distribution. *Bielefield v. Record*, 2 Sim. 354.

Chap. XII.

life, "payable" bears its ordinary meaning.

GIFTS OVER UPON DEATH BEFORE ACTUALLY RECEIVING THE LEGACY.

1. When it is clear that the testator refers only to legatees living at his death and there is a gift over if any die before their shares are payable or before receiving their shares, the gift over cannot refer to death in the lifetime of the testator. V.-C. Kindersley, in such a case, held that the gift over was good with regard to the shares of those who died within a year after the testator's death; but, apparently, in such a case, the Court would inquire at what time the money might have been paid. *Arrowsmith's Trusts*, 29 L. J. Ch. 775; 6 Jur. N. S. 1231; on appl., 2 D. F. & J. 474; *In re Chaston*; *Chaston v. Seago*, 18 Ch. D. 218.

Gift to persons living at the testator's death, with a gift over upon death before payment.

2. In the same way under an immediate bequest with a gift over upon death "before me or before the division or final division of my estate," the gift over takes effect upon the shares of legatees dying within a year from the testator's death. *In re Collison*; *Collison v. Barber*, 12 Ch. D. 834; *In re Wilkins*; *Spencer v. Duckworth*, 18 Ch. D. 634. See *In re Potts*; *Hooley v. Fountain*, W. N. 1884, 106.

3. Where the bequest is after a life interest, with a gift over on death before the legatee receives his legacy, the gift over does not take effect if the legatee survives the tenant for life. *Re Dodgson's Trust*, 1 Drew. 440; *Whiting v. Force*, 2 B. 571; *Wilks v. Bannister*, 30 Ch. D. 512.

Death before receipt.

Although there can be no justification, except that of avoiding inconvenience, for construing "received" or "paid" as equivalent to "receivable" or payable," yet there is more plausibility in saying that receipt by a trustee, where the cestui que trust is absolutely entitled, may be treated as equivalent to receipt by the cestui que trust himself. See *Minors v. Battison*, 1 App. C. 428.

Chap. XII.

Actual pay-
ment or
receipt.

4. Where, however, the gift over is in the event of death before the legacy is actually paid or received, or other words are used which import the transfer of property from the executor or trustee to the legatee, the cases are in appearance difficult to reconcile. The distinction between the effect of such gifts over in the case of a residue and in the case of a pecuniary legacy does not appear to have been adverted to; but it will be found to justify most if not all of the decisions.

a. Where a share of residue is given to a legatee, with a gift over, if the legatee dies before actual receipt of his share, it cannot be ascertained at any given time whether the gift over will take effect or not. There is no ground for treating a gift of residue as limited to the residue capable of realization within a year from the testator's death; assets may fall into it many years after that time; and an increase of the divisible residue after the legatee's death would, if the gift over is strictly construed, bring it into operation. Such a divesting clause, therefore, is void for uncertainty. *Hutcheon v. Mannington*, 1 Ves. Jun. 366; 4 B. C. C. 491; *Martin v. Martin*, L. R. 2 Eq. 404; *Minors v. Battison*, 1 App. C. 428; *Bubb v. Padwick*, 13 Ch. D. 517.

b. But the objection does not apply if, as in *Johnson v. Crook*, 12 Ch. D. 639, the gift is immediate and the gift over is only of so much as the legatee has not received at his death. Here, the question whether the gift over comes into effect is answered at the legatee's death. If his death must happen within the period fixed by the rule against perpetuities, there can be no objection on that score to the gift over, although the improbability of the testator intending such a bifurcation of his residue may afford a reason for construing the words in another sense.

c. Nor is there any objection to the gift over where, as in *Whitman v. Aitken*, L. R. 2 Eq. 414, the original gift is a pecuniary legacy, incapable of augmentation.

But the improbability of any testator intending a construction which would make the interests of beneficiaries depend upon chance, has induced the Courts to affix some other construction even to words naturally indicating an actual receipt by the legatee. See *Law v. Thompson*, 4 Russ. 92.

5. If there is a gift upon trust for sale and division among certain legatees, a gift over if any die before the sale is completed is valid. *Faulkener v. Hollingworth*, cit. 8 Ves. 559; *Elwin v. Elwin*, 8 Ves. 547; see *Bernard v. Montague*, 1 Mer. 433; see 11 Ves. 508. Chap. XII.
Death before
sale com-
pleted.

6. A gift over upon death before the execution of all or any of the trusts of the will is void. *Roberts v. Youle*, 49 L. J. Ch. 744. Death before
execution of
trusts.

Where there was a direction to convert and to hold the proceeds of conversion upon trust for the testator's children, a gift over of the share of any child who should die "during the continuance of the trusts hereinbefore declared" was held to refer to death during the continuance of certain trusts specially declared of one item of the testator's property and not to death before the complete conversion of the residue. *Re Teale*; *Teale v. Teale*, 53 L. T. 936; 34 W. R. 248.

GIFTS OVER UPON DEATH UNMARRIED AND WITHOUT ISSUE.

1. In a gift over upon death unmarried without any explanatory context, unmarried means never having been married. *Dalrymple v. Hall*, 16 Ch. D. 715; see *Blundell v. De Falbe*, 57 L. J. Ch. 576; 58 L. T. 621 (marriage settlement). Unmarried.

2. Where vested interests are given at twenty-one or marriage, a gift over upon death unmarried and without issue will mean never having been married. *Heywood v. Heywood*, 29 B. 9; *Pratt v. Matthew*, 8 D. M. & G. 522; *Gonne v. Cooke*, 15 W. R. 576. Gift over
upon death
unmarried
and without
issue when
vested inter-
ests are
given upon
marriage.

3. And, perhaps, the same construction would be adopted where the gift is to A. simply and if he dies unmarried and without issue over; the argument in favour of the construction being that A.'s interest would then be indefeasible upon his marriage. See *Heywood v. Heywood*, *supra*; see *In re Saunders' Trusts*, 3 K. & J. 152; *Radford v. Willis*, 7 Ch. 7; *Long v. Lane*, 17 L. R. Ir. 11.

The case of *Doe d. Baldwin v. Rawding*, 2 B. & Ald. 441, is not opposed to this view, since the donee there left a husband

Chap. XII.

surviving her, so that upon no construction of unmarried could the gift over take effect. The point did not arise in *Bell v. Phyn*, 7 Ves. 450.

4. Of course, if the legatee were married at the date of the will this construction would be impossible.

Unmarried
may refer to
a second
marriage.

In *Crosthwaite v. Dean*, 5 Eq. 245, a gift over of a fund in case the legatee should marry or die unmarried, where the legatee was married at the date of the will and of the testator's death, but her husband was believed to be dead, was held to refer to a second marriage. See, too, *Lepine v. Bean*, 10 Eq. 160; *Smith v. Charles*, 13 W. R. 224.

Gift over
upon death
unmarried
and without
issue after a
prior gift to
the legatee
for life, and
then to his
children.

5. If the gift is to A. for life, remainder to his children, and if A. dies unmarried and without issue over, unmarried will be read as equivalent to not having a wife at his death. To read it as never having been married would increase the chance of intestacy, since in that case, if A. married and had no children, the gift over would not take effect; and, again, the word unmarried would be mere surplusage. *Doe d. Everett v. Cooke*, 7 East, 269; *In re Sanders' Trusts*, L. R. 1 Eq. 675; see *Re King*; *Salisbury v. Ridley*, 62 L. T. 789.

"AND" CHANGED INTO "OR" IN GIFTS OVER.

Devise to A.
in fee, and if
he dies under
21 and with-
out issue over.

1. If there is a devise to A. in fee and if he dies under twenty-one and without issue over, "and" will not be read "or." To do so would have the effect of divesting a prior devise in events other than those mentioned. *Malcolm v. Malcolm*, 21 B. 225; *Coates v. Hart*, 32 B. 349; 3 D. J. & S. 504.

And, similarly, a gift to A. for life, and then to her children, and if she dies under twenty-one and without children over, will not be construed as if it were under twenty-one or without children. *Key v. Key*, 1 Jur. N. S. 372.

Devise to A.
in tail, and if
he dies under
21 and with-
out issue over.

2. If the devise is to A. in tail and if he dies under twenty-one and without issue over, "and" will not be read "or." *Grey v. Pearson*, 6 H. L. 61, and *Doe d. Usher v. Jessup*, 12 East, 288; overruling *Brownsword v. Edwards*, 2 Ves. Sen. 243, so

far as it is an authority on this point. In this case there is reason for contending that the devise over ought to be read as equivalent to "if he dies under twenty-one or at any time without issue," since the estate would take effect as a remainder after an estate tail; but this would deprive the issue of any benefit if the devisee died under twenty-one leaving issue, unless the devise were read under twenty-one without issue, or at any time without issue, involving a very considerable alteration of the words of the will.

This latter construction, however, would perhaps be adopted if the original devise in tail were made contingent upon the devisee attaining twenty-one or having issue. *Brownsword v. Edwards*, 2 Ves. Sen. 243.

3. A different question arises where the gift over is upon two events, one of which includes the other, as "if A. dies unmarried and without children."

Gift over upon two events, one of which includes the other.

If the gift is to A. for life and then to his children absolutely, so that if A. marries but has no children there would be an intestacy, there are two possible constructions:

a. If possible, unmarried will be held to mean unmarried at the time of death, and it is then unnecessary to change "and" into "or." *Doe d. Baldwin v. Rawding*, 2 B. & Ald. 441; *Doe d. Everett v. Cooke*, 7 East, 269; *In re Sanders' Trusts*, L. R. 1 Eq. 675; see *ante*, p. 570.

Unmarried if possible will mean not married at the death.

The same is the case if unmarried means "not married by consent." *Dillon v. Harris*, 4 Bl. N. S. 321.

b. If, however, it is clear that unmarried must mean never having been married, it seems doubtful whether "and" will not be changed into "or." According to the earlier cases, there is no doubt that the change would be made. *Wilson v. Bayly*, 3 B. P. C. 195; *Hepworth v. Taylor*, 1 Cox, 112; *Maberley v. Strode*, 3 Ves. 450; *Bell v. Phyn*, 7 Ves. 453; see *Long v. Lane*, 17 L. R. Ir. 11.

If unmarried must mean never married "and" will be changed into "or."

These cases are, however, of doubtful authority, since the term "unmarried" would probably now in all similar cases be held equivalent to "not married at the death."

The question in *Grey v. Pearson*, 6 H. L. 61, was so different that it can hardly be said to have any bearing upon this point.

Chap. XII.

Gift over after an absolute interest, if the legatee dies before marriage and without issue.

But if the gift is to A. absolutely, and if he dies before marriage and without children over, "and" will not be read "or," as to do so would be to increase the defeasibility of interests already completely disposed of in all events. *Secombe v. Edwards*, 28 B. 440.

Where land was devised to A. absolutely, with a gift over if A. died "unmarried and without legal issue," and A. was given a power to jointure a widow in a limited sum, it was held that, in order that the power might not be otiose, "unmarried" must be construed "never having been married" and "and" must be changed into "or." *Long v. Lane*, 17 L. R. Ir. 11.

"And" will not be changed into "or" where the gift over is upon death in the testator's lifetime, and before receiving any benefit. *In re Kirkbride's Trusts*, L. R. 2 Eq. 400.

Gift over upon two independent events.

4. Where the two events upon which the gift over is made to depend are independent of each other, there can be no reason for changing "and" into "or." *Day v. Day*, Kay, 703; *Reed v. Braithwaite*, 11 Eq. 514; see *Barker v. Young*, 33 B. 353.

CHANGE OF "OR" INTO "AND" IN GIFTS OVER.

Gift over upon death under age or without lawful issue.

1. If there is a devise to A. in fee if she dies leaving lawful issue, but if she dies under age or without lawful issue over, "or" will be read "and." *Johnson v. Simcock*, 6 H. & N. 6; 9 W. R. 895.

2. If the devise is to A. in fee, and if he dies under twenty-one or without issue over, "or" will be read "and," to favour the issue of A. *Fairfield v. Morgan*, 2 B. & P. N. R. 38; *Denn v. Wilkins v. Kemeys*, 9 East, 366; *Eastman v. Baker*, 1 Taunt. 174; *Morris v. Morris*, 17 B. 198.

3. If the devise is to A. for life, remainder to his children in tail, and if A. dies under twenty-one or without children over, it is doubtful whether "or" would be read "and." According to the earlier authorities, the change would be made. *Harker v. Sutton*, 1 Bing. 501; 9 J. B. Moo. 2; but see *Cooke v. Mirehouse*, 34 B. 27.

4. And where, after a prior absolute gift, the gift over is upon failure of issue or some other event, such as not making a will, "or" will be read "and," though the gift over may thereby become void. *Incorporated Society v. Richards*, 1 D. & War. 258; *Greated v. Greated*, 26 B. 621; *Green v. Harvey*, 1 Ha. 428; *Stretton v. Fitzgerald*, 23 L. R. Ir. 310, 466.

Chap. XII.

Gift over upon failure of issue or some other event.

5. But if the devise is to A. in tail and if he dies under twenty-one or without issue over, "or" will not be construed "and;" though, on the other hand, it seems that if the devisee died under twenty-one leaving issue, the gift over would not be held to have taken effect, so that the devise would, in fact, be construed as equivalent to "if A. dies under twenty-one without issue or without issue at any time." *Mortimer v. Hartley*, 6 Ex. 47; *Soulle v. Gerard*, Cro. Eliz. 525; *Woodward v. Glasbrook*, 2 Vern. 388; and Lord St. Leonard's judgment in *Grey v. Pearson*, 6 H. L. 61. The devise over in this case takes effect as a remainder after an estate tail.

Devise to A. in tail, and if he dies under 21 or without issue over.

6. But if the devise over after an estate tail to A. is in case of the death of A., or want of his issue, "or" must be read "and," in order to preserve the prior estate. *Monkhouse v. Monkhouse*, 3 Sim. 119.

Gift over in case of death of the devisee or failure of his issue.

7. "Or" will be read "and" when a gift is given upon either of two events, as upon attaining twenty-one or marriage, and there is gift over upon death under twenty-one or unmarried, the gift over being otherwise inconsistent with the prior gift. *Grant v. Dyer*, 2 Dow, 87; *Thompson v. Teulon*, 22 L. J. Ch. 243; *Thackeray v. Hampson*, 2 S. & St. 214; *Grimshawe v. Pickup*, 9 Sim. 591; *Collett v. Collett*, 35 B. 312.

"Or" read "and" in the gift over when the gift is vested in one or other of the two events.

8. In some cases where there has been a gift contingent upon attaining twenty-one, subject to a life interest, and a gift over upon death before the tenant for life or under twenty-one, "or" has been read "and." *Miles v. Dyer*, 5 Sim. 435; 8 Sim. 330; *Bentley v. Meech*, 25 B. 197.

Gift over upon death before the tenant for life, or under 21.

And if a gift over upon death under age or without leaving a husband is afterwards referred to as "in case of death under age as aforesaid," "or" will be read "and." *Weddell v. Mundy*, 6 Ves. 341.

Chap. XII.

GIFT OVER UPON DEATH WITHOUT CHILDREN.

"Children"
read "issue"
in a gift over
upon death
without
children.

In many cases where an estate in fee is given, followed by a gift over in the event of the devisee dying without children, the word children has been construed as synonymous with issue. *Doe d. Smith v. Webber*, 1 B. & Ald. 713; *Doe d. Simpson v. Simpson*, 5 Sc. 770; 4 Bing. N. C. 333; *Doe d. Blesard v. Simpson*, 3 M. & Gr. 929; *Bacon v. Cosby*, 4 De G. & S. 261; *Parker v. Birks*, 1 K. & J. 156; *Richards v. Davies*, 13 C. B. N. S. 69, 861; see *Mathews v. Gardiner*, 17 B. 254.

And the same construction would perhaps be put upon a similar gift over after an absolute bequest of personalty. *Synge's Trust*, 3 Ir. Ch. 379; see *Stone v. Maule*, 2 Sim. 490.

GIFTS OVER UPON DEATH WITHOUT LEAVING OR HAVING
ISSUE.

Leaving
construed as
equivalent to
having.

The word leaving in a gift over upon death without leaving issue will, if possible, be so construed as not to destroy prior vested interests, it will in fact be taken as equivalent to "without having had children who take vested interests."

1. Thus, when there is a bequest or devise to A. for life and after his death to his children, whether a particular time is fixed at which their shares are to vest or not, followed by a gift over upon the death of A. without leaving children, the children of A., either at their birth or at the particular time appointed, as the case may be, take indefeasible interests not liable to be defeated by death during the life of A. *Maitland v. Chalie*, 6 Mad. 243; *Marshall v. Hill*, 2 Mau. & S. 608; *Ex parte Hooper*, 1 Dr. 264; *Kennedy v. Sidgwick*, 3 K. & J. 540; *Re Thompson's Trusts*, 5 De G. & S. 667; *White v. Hill*, 4 Eq. 265; *Casamajor v. Strode*, 8 Jur. 14; *In re Brown's Trust*, 16 Eq. 239; *Treharne v. Layton*, L. R. 10 Q. B. 459.

But the principle does not apply where the gift over is on the death of the tenant for life without leaving any children him surviving. *In re Hamlet*; *Stephen v. Cunningham*, 38 Ch. D. 183; 39 Ch. D. 426.

And it does not apply where the subject matter of the gift is an annuity, and the testator contemplates personal enjoyment by the legatees in remainder. *In re Hemingway*; *James v. Dawson*, 45 Ch. D. 453. Chap. XLI.

2. The Court, however, will not depart from the ordinary meaning of the word leaving, in order to vest interests which were not vested before.

When the gift is, for instance, if the tenant for life leaves children, to all such children, with a gift over in the event of his death without leaving children, the word leaving must have its ordinary meaning. In these cases the condition of surviving the tenant for life is part of the original gift, and there is no question of divesting a prior gift. *Sheffield v. Kennett*, 27 B. 207; 4 De G. & J. 593; *Bythesea v. Bythesea*, 17 Jur. 645; 23 L. J. Ch. 1004; *Young v. Turner*, 1 B. & S. 550; see *In re Watson's Trust*, 10 Eq. 36, and the comments therein upon *Bryden v. Willett*, 7 Eq. 472; *Jeyes v. Savage*, 10 Ch. 555; and see *Hedges v. Harpur*, 3 De G. & J. 129.

3. And where there is a gift to A. absolutely and a gift over on his death without leaving children, the word "leaving" will be construed strictly. *In re Ball*; *Slattery v. Ball*, 36 Ch. D. 508; 40 Ch. D. 11, overruling *White v. Hight*, 12 Ch. D. 751; see *Clay v. Coles*, 57 L. T. 682; *Armstrong v. Armstrong*, 21 L. R. Ir. 115.

4. It seems the words "without having any child" may be construed as equivalent to "without having had" any child. *Weakley d. Knight v. Rugg*, 7 T. R. 322; *Wall v. Tomlinson*, 16 Ves. 413; *Jeffreys v. Conner*, 28 B. 328. Without having any child.

5. But the words "without any children" mean without children at the death. *Thicknesse v. Liege*, 2 B. P. C. 365; *Jeffreys v. Conner*, *supra*; see *In re Hambleton*; *Hambleton v. Hambleton*, W. N. 1884, 157. Without any children.

CHAPTER XLII.

GIFTS OVER UPON DEATH WITHOUT ISSUE.

Chap. XLII.

Gift over
upon death
of the devisee
without issue
before a given
period.

Gift over
upon death
without issue
to persons
then living.

Effect of the
29th sect. of
the Wills Act
upon gifts in
default of
issue.

WHEN there is a gift over upon the death of A. without issue before a given period, the gift over takes effect upon the failure of issue of A., not necessarily at his death, but at any time before the given period, whether the will is before or since the Wills Act. *Jarman v. Vye*, L. R. 2 Eq. 784.

It is not quite clear whether a devise upon failure of issue to such of certain named legatees as should be "then living," which would in a will before the Act have been held to take effect upon failure of issue of the ancestor at his death, or at any time during the lives of the surviving legatees, would now be held to take effect only upon failure of issue of the ancestor at his death. See *Murray v. Addenbrook*, 4 Russ. 407; *Greenwood v. Verdon*, 1 K. & J. 74.

By sect. 29 of the Wills Act, words "which may import either a want or failure of issue of any person in his lifetime, or at the time of his death, or an infinite failure of his issue, shall be construed to mean a want or failure of issue in the lifetime, or at the time of the death of such person, and not an indefinite failure of his issue, unless a contrary intention shall appear by the will, by reason of such person having a prior estate tail or of a preceding gift being, without any implication arising from such words, a limitation of an estate tail to such person or issue, or otherwise: provided that this Act shall not extend to cases where such words as aforesaid import if no issue described in a preceding gift shall be born, or if there shall be no issue who shall live to attain the age or otherwise answer the description required for obtaining a vested estate by a preceding gift to such issue." See *In re Chinnery's Estate*, 1 L. R. Ir. 296.

The words dying without male issue will, under this section, be restricted to male issue living at the death of the ancestor. *Upton v. Hardman*, 1 R. 9 Eq. 157; *In re Edwards*; *Edwards v. Edwards*, (1894) 3 Ch. 644. Chap. XLII.
Death without issue male.

This section does not apply :—

1. Where the words used are heirs of the body and not issue. *Harris v. Davis*, 1 Coll. 416; *Re Sallery*, 11 Ir. Ch. 236; *Dawson v. Small*, 9 Ch. 651. In what cases the section does not apply.

2. Where the failure of issue would not before the Act have been constructed to import an indefinite failure of issue. *Morris v. Morris*, 17 B. 198.

3. Apparently it would not apply where there is a gift of personalty to A. and the heirs of his body, followed by a gift over in default of his issue. At any rate, it does not where realty and personalty are given together in tail. *Green v. Green*, 3 De G. & S. 480; see *Greenway v. Greenway*, 2 D. F. & J. 137; *Green v. Giles*, 5 Ir. Ch. 25.

REFERENTIAL CONSTRUCTION OF GIFTS OVER UPON DEATH WITHOUT ISSUE.

The construction of gifts over in default of issue is not affected by the Wills Act, where those words are construed to mean default of issue to take under the preceding limitations. It becomes necessary, therefore, to consider in what cases the referential construction has been adopted.

A. Where the words are for default of *such* issue, they naturally refer to the issue before mentioned.

1. This is clearly the case where the prior limitations are in tail. *Doe d. Phipps v. Lord Mulgrave*, 5 T. R. 320. Gift over in default of such issue, after limitations in tail.
2. So where the prior limitations are to children and their heirs, a gift over in default of such issue means in default of such children. *Doe d. Comberbach v. Perryn*, 3 T. R. 484; *Rex v. Marquess of Stafford*, 7 East, 521. After limitations in fee.

But if there is anything to show that the children were intended to take estates tail, the words in default of such issue may be referred to the word heirs so as to cut down the estates

Chap. XLII.

to estates tail. Thus, where the limitation was to the first and other sons and their heirs, a gift over in default of such issue was referred to the word heirs, the intention being that the sons were to take in succession. *Lewis d. Ormond v. Waters*, 6 East, 336.

In *Biddulph v. Lees*, 8 E. & B. 289, the intention to give estates tail was apparent from the shifting clause.

After limitations for life.

3. And even though the limitation be to children simply, so that they would only take for life, a gift over in default of such issue will be construed referentially. *Hay v. Earl of Coventry*, 3 T. R. 83; *Denn d. Breddon v. Page*, 3 T. R. 87, n.; 11 East, 603, n.; *Ashley v. Ashley*, 6 Sim. 358; *Bridger v. Ramsay*, 10 Ha. 320; *Re Arnold's Estate*, 33 B. 163.

After limitations giving a first son a life interest only and the other sons estates tail.

4. On the other hand, where there is a limitation to a first son without more, followed by limitations in default of such issue to the other sons in tail, the Court will lay hold of small circumstances to give the first son also an estate tail.

Thus, in *Evans d. Brooke v. Astley*, 3 Burr. 1569, there was the circumstance that the testator referred to the earlier limitations as including the "parent and his descendants."

In *Clements v. Paske*, 3 Doug. 314, the limitation to the first son was referred by the word "likewise" to other limitations in fee.

And see *Doe d. Harris v. Taylor*, 10 Q. B. 718, which may perhaps be supported on the ground that the words "the elder of such sons and the heirs of his body to take before the younger," applied to the first son as well as to the others. See, however, *Barnacle v. Nightingale*, 14 Sim. 456; and see *Galley v. Barrington*, 2 Bing. 387; *In re Denny's Estate*, I. R. 8 Eq. 427.

Inaccurate use of the word "such."

5. The *prima facie* meaning of the word "such" is to refer the word with which it is coupled to earlier words, so that the latter word is only a compendious statement of the earlier limitations; it may, however, have the converse effect if there is anything upon the will to show that the testator used the earlier word in the sense of the later; and the word "such" may be rejected, if the term with which it is coupled and that to which it refers are so inconsistent with each other, that the testator cannot

have meant the one as a mere compendious reference to the other. Chap. XLII.

Thus a devise to A. and his heirs, and in default of such issue over would, perhaps, in a will cut down A.'s estate to an estate tail. See *Idle v. Cook*, 1 P. W. 70.

And in *Parker v. Tootal*, 11 H. L. 143, where the devise was to Thomas for life, remainder to the first son of the said Thomas in tail male lawfully begotten, severally and successively; and for want of such lawful issue either of Thomas or of James, over, the word such was practically rejected and Thomas took an estate tail.

B. When there is a devise to A. for life, followed by particular limitations in favour of some of his issue, with an ultimate limitation on failure of the issue of A., the question arises whether the intention was to benefit all the issue, notwithstanding the incomplete enumeration of them under the special limitation, in which case, in wills before the Wills Act, the gift over in default of issue will give A. an estate tail, or whether the issue intended to be benefited are sufficiently indicated by the special limitations, in which case the failure of issue will be construed to mean such issue as before mentioned.

Gift over in default of issue simply.

1. If the devise is to A. for life, then to his children, so that they take vested estates in fee or tail, and in default of issue of A. over, issue means the issue before mentioned, and A.'s estate will not be enlarged. *Foster v. Hayes*, 2 E. & B. 27; 4 E. & B. 717; *Towns v. Wentworth*, 11 Moo. P. C. 526; *Smyth v. Power*, 1 R. 10 Eq. 192; see *Bowen v. Lewis*, 9 App. C. 890.

When the prior limitations are to the ancestor for life with remainder to his children in fee or in tail.

And this is the case, though the children included under the prior limitations may be sons only and not daughters, and though the prior estates may be in tail male. *Turke v. Frenchman*, 2 Dyer, 171; 1 And. 8; *Baker v. Tucker*, 11 Ir. Eq. 104; 3 H. L. 106; *Grattan v. Langdale*, 11 L. R. Ir. 473.

When the prior limitations include sons only.

Quære, whether it makes any difference in the construction of the gift over in default of issue that the ancestor has children living at the date of the devise. See *Doe d. Todd v. Tuesbury*, 8 M. & W. 514, commented on in 4 E. & B. 730.

2. If, however, the prior limitations include less than the whole number of sons the referential construction will not be adopted.

Where the prior limitations include

Chap. XLII.

less than the whole number of sons.

Langley v. Baldwin, 1 Eq. Ab. 185, pl. 29, cit. 1 P. W. 759; *A.-G. v. Sutton*, 1 P. W. 753; 3 B. P. C. 75; *Stanley v. Lennard*, Amb. 355; 1 Ed. 87; *Key v. Key*, 4 D. M. & G. 73.

The referential construction is, however, more readily adopted where the limitations are to some of the issue at twenty-one, and there is a gift over in default of issue who attain twenty-one. *Sanders v. Ashford*, 28 B. 609.

When the failure of issue is restricted to such failure at the ancestor's death.

3. If the failure of issue is restricted to failure at the death of the parent the referential construction will not be adopted, as it might have the effect of divesting the interests of children who had died before the tenant for life leaving children. *Westwood v. Southey*, 2 Sim. N. S. 192; *Ex parte Hooper*, 1 Dr. 264; *Re Tookey's Trust*, 21 L. J. Ch. 402; *In re Biron*, 1 L. R. Ir. 258.

Gift over in default of issue after a power to appoint to issue by will.

4. If the gift is to A. for life, then to such issue as he should appoint by will and if A. dies without issue over, issue in the gift over is held to refer to the issue before-mentioned, that is to say, issue living at the death of A. *Target v. Gaunt*, 1 P. W. 432; *Hockley v. Mawbey*, 1 Ves. Jun. 143; 3 B. C. C. 82; *Leeming v. Sherratt*, 2 Ha. 14; *Hanan v. Drew*, 10 Ir. Eq. 333; *Eastwood v. Avison*, L. R. 4 Ex. 141.

Where the limitations to issue are contingent.

5. When the limitations to issue are contingent upon attaining a certain age, it seems the referential construction would not be adopted. *Doe d. Rew v. Lucraft*, 1 M. & Sc. 573; 8 Bing. 386; *Franks v. Price*, 6 Sc. 710; 5 Bing. N. C. 37; 3 B. 182.

Where the children take for life only in wills before the Wills Act.

6. In wills before the Wills Act, where the devise to children is without words of limitation so that they only take estates for life, the referential construction will not be adopted, but the parent will take an estate tail in remainder after the life estates. *Parr v. Swindells*, 4 Russ. 283. *Bennett v. Lowe*, 5 M. & Pay. 485; 7 Bing. 535, is not inconsistent with this rule, since the gift over was not upon an indefinite failure of issue; and *Wight v. Leigh*, 15 Ves. 564, which conflicts with the latter branch of this rule, would probably not now be followed.

C. Similar rules apply to personalty.

Referential construction of gifts over upon death

1. Thus in a bequest to A. for life and then to his children and if A. dies without issue over, the gift over refers to the failure of the objects of the prior gift. *Doe d. Lyde v. Lyde*,

1 T. R. 593; *Salkeld v. Vernon*, 1 Ed. 64; *Robinson v. Hunt*, 4 B. 450; *In re Wyndham's Trusts*, L. R. 1 Eq. 290; *In re Sanders' Trusts*, *ib.* 675. Chap. XLII.
without issue
in the case of
personalty.

"If there be no child there can be no other issue, and if there be a child, the child will take the whole, and there will be nothing to limit over." *Per* Turner, L.J., *Pride v. Fooks*, 3 De G. & J. 252.

Where family plate was settled on A. for life, with remainder to B. his first son for life, with remainder to B.'s first son absolutely, and in the event of B.'s first son dying under twenty-one and without issue to the second and other sons of B. in the same way, and in default of sons of B. similar limitations in favour of the second and other sons of A. absolutely, with an ultimate limitation if there should be no son of A. or B. who should attain twenty-one or die under that age leaving issue, the ultimate gift over took effect, though B. attained twenty-one. *Cardigan v. Curzon Howe*, 9 Eq. 358.

2. Where the prior gifts to the children are not vested so that there may be issue who may not take under them, for instance, children of children who die before the time of vesting, it is less easy to admit the referential construction and it seems that without some further indications to be collected from the will it will not be adopted. *Pride v. Fooks*, 3 De G. & J. 252; *Walker v. Mower*, 16 B. 365. Where the
prior gifts to
issue are
contingent.

And the same is the case where the gifts to the children are only to arise upon a contingency, as for instance, if the legatee marries. *Andree v. Ward*, 1 Russ. 260; *Campbell v. Harding*, 2 R. & M. 390; 2 Cl. & Fin. 431; 8 Bl. N. S. 469.

Under a gift to a tenant for life and then to such children as she should leave at her decease, with a power of appointment to the tenant for life in the event of her death without issue, the referential construction was adopted. *In re Merceron's Trusts*; *Davies v. Merceron*, 4 Ch. D. 182.

3. The referential construction may be assisted by other limitations. See *Malcolm v. Taylor*, 2 R. & M. 416, where this construction was assisted by the devise of the realty. Referential
construction
assisted by
other limita-
tions.

4. And when there is elaborate provision made for the issue of children dying before the time of vesting and born within When the
issue of
parents dying

Chap. XLII.
before the
time of
vesting are
provided for.
Bequest in
joint tenancy
to a parent
and children,
followed by a
gift over on
death without
issue.

the limits of perpetuity, a gift over in default of issue may very well be referred to the prior limitations. *Ellicombe v. Gompertz*, 3 M. & Cr. 127; *Trickey v. Trickey*, 3 M. & K. 560.

5. The referential construction will not be adopted where the bequest is in joint tenancy to A. and her children, with a gift over in default of issue. In this case the whole is already disposed of, whether children are born or not, and in the absence of some further indication of intention there can be no reason for attempting to make the gift over valid in order to divest absolute interests. *Fisher v. Webster*, 14 Eq. 283.

GIFTS OVER UPON DEATH WITHOUT ISSUE BEFORE THE WILLS ACT.

Such words as "dying without issue," or "without leaving," or "having issue" in devises before the Wills Act, are construed to mean an indefinite failure of issue. *Lee's Case*, 1 Leon. 285, pl. 387; *Cole v. Goble*, 13 C. B. 445.

Cases before
the Wills Act,
in which gifts
over on
failure of issue
will not
import an
indefinite
failure.

But with regard to personalty, death without *leaving* issue is held to mean leaving issue at the death. And where real and personal estate is devised by the same words, death without leaving issue will import an indefinite failure of issue as regards the realty, but a failure of issue at the death as regards the personalty. *Forth v. Chapman*, 1 P. W. 663; *Bamford v. Chadwick*, 2 W. R. 530.

The failure of issue will, however, be restricted in devises of realty :

Gift over
upon failure
of the testa-
tor's own
issue.

1. If the ulterior limitations are made to depend upon a failure of issue of the testator and there are found amongst the ulterior limitations provisions which could not reasonably be meant to depend upon a general failure of issue, such as directions for payment of debts. *Rye's Settlement*, 10 Ha. 106.

It has been said that a devise on failure of the testator's *own* issue, he having none at the time, will in itself be sufficient to show that the testator does not refer to an extinction of issue at any time. The cases, however, quoted in support of the proposition cannot be said to establish the exact point, since in

all of them the devise over was for payment of debts or legacies. Chap. XLII.
French v. Caddell, 3 B. P. C. 257; *Wellington v. Wellington*,
 4 Burr. 2165; 1 W. Bl. 645; *Lytton v. Lytton*, 4 B. C. C. 441;
Sanford v. Irby, 3 B. & Ald. 654.

In *Bagot v. Legge*, 12 W. R. 1097; 4 N. R. 492, it was assumed that a devise upon failure of the testator's issue, though he had none at the time, would have been void for remoteness.

2. If the devise is upon death without issue under twenty-one or over twenty-one, or upon some other event personal to the devisee. *Toovey v. Bassett*, 10 East, 460; *Right v. Day*, 16 East, 67; *Gwynne v. Berry*, 1 R. 9 C. L. 494. Death without issue under 21.

The same rule has been applied where the limitations were upon death under twenty-one and without issue. *Glover v. Monckton*, 3 Bing. 13; *Doe d. Johnson v. Johnson*, 8 Ex. 81.

But the rule does not apply where the event is not purely personal to the devisee; for instance, if the gift over is if A. survives B. and dies without issue. *Feakes v. Standley*, 24 B. 485.

3. So, too, with regard to personalty, a gift over if A. dies under twenty-one without issue means issue living at his death. *Pawlet v. Dogget*, 2 Vern. 85; *Martin v. Long*, *ib.* 151; *Morris v. Morris*, 17 B. 198. As regards personalty.

4. Failure of issue is restricted to failure at the death of the parent if the devise is on failure of the issue of A., then "at" or "on" the death of A. over. *Doe d. Smith v. Webber*, 1 B. & Ald. 713; *Doe d. King v. Frost*, 3 B. & Ald. 546; *Ex parte Davies*, 2 Sim. N. S. 114; *Parker v. Birks*, 1 K. & J. 156. Gift over at or on the death of the ancestor.

It makes no difference whether A. takes the fee or only a life estate owing to the absence of words of limitation. *Coltsmann v. Coltsmann*, L. R. 3 H. L. 121.

There seems no reason to doubt that in the case of realty the words "after the death of A." would *prima facie* mean immediately after and have the same restrictive force as they have in the case of personalty. See *Trotter v. Oswald*, 1 Cox, 317. Effect of the word after.

But it may appear from the context that those words were not to have a restrictive force. *Walter v. Drew*, Com. 373; *Jones v. Ryan*, 9 Ir. Eq. 249.

Chap. XLII.

Rule in the case of personalty.

In the same way with regard to personalty, if the gift is if A. die without issue at, on, or after his decease over, the failure of issue means failure at A.'s death. *Pinbury v. Elkin*, 1 P. W. 563; *Trotter v. Oswald*, 1 Cox, 317; *Wilkinson v. South*, 7 T. R. 555; *Rackstraw v. Vile*, 1 S. & St. 604; *Hedges v. Harpur*, 3 De G. & J. 129.

Effect of a direction to pay a sum of money upon the decease of the ancestor.

5. So, too, if a sum of money is to be paid upon the decease of the devisee, upon failure of whose issue the estate is given over, or within a short time afterwards, the failure of issue will not import an indefinite failure. *Doe d. Smith v. Webber*, 1 B. & Ald. 713; *Doe d. King v. Frost*, 3 B. & Ald. 546; *Nichols v. Hooper*, 1 P. W. 198; 2 Vern. 686; *Blinston v. Warburton*, 2 K. & J. 400; *Rye's Settlement*, 10 Ha. 106. Perhaps *Keily v. Fowler*, 6 B. P. C. 309; Wilm. 298, comes under this head.

Gift over in default of issue to persons "then living."

6. A gift over upon failure of issue to persons "then living," the persons being such as must be ascertained within the limits of perpetuity, will not be construed to mean an indefinite failure of issue. *Murray v. Addenbrook*, 4 Russ. 407; *Greenwood v. Verdon*, 1 K. & J. 74.

In such cases the failure of issue contemplated is not a failure at the death of the ancestor, but at any time during the lives of the legatees to take under the gift over. Cases *supra cit*, and *Crowder v. Stone*, 3 Russ. 217; and see *Jarman v. Vye*, L. R. 2 Eq. 784.

Candy v. Campbell.

In *Candy v. Campbell*, 8 Bl. N. S. 469; 2 Cl. & F. 421, a gift in default of issue to the testator's nephews and nieces who might be living at the time, was held void for remoteness. In this case the nephews and nieces may not all have been born at the testator's death; the donees therefore would not have been ascertained within the limits of perpetuity.

In *Jee v. Audley*, 1 Cox, 324, the point does not appear to have been raised whether the failure of issue could be restricted to the lives of the persons to take under the gift over.

Of course, where the class to whom the property is given on failure of issue would include persons coming into being at any time before the failure of issue takes place, there is no reason for restricting the failure of issue. *Webster v. Parr*, 26 B. 236.

In the same way, where the class, to whom the gift is made upon failure of issue, is not to be ascertained at the time when the failure happens, but upon some collateral event; if, for instance, the gift is upon failure of issue to the children of my brothers living at the death of my last child, so that the class to take is ascertained at a different time from the period of possession, there is no reason for restraining the failure of issue, since children may take transmissible interests without surviving the failure of issue. *Garrett v. Cockerell*, 1 Y. & C. C. 494.

Chap. XLII.

Gift in default of issue to a class ascertainable upon some collateral event.

7. It would seem that the same principle ought to apply where the gift is to several, and if any die without issue to the survivors.

Gift in default of issue to survivors.

Therefore, in such a case, if survivors means those who survive the failure of issue, the failure of issue can only import a restricted failure. The cases, however, seem to show that a mere gift if any die without issue to the survivors without more would be sufficient to restrict the failure of issue to the death of the parent. *Hughes v. Sayer*, 1 P. W. 534; *Ranelagh v. Ranelagh*, 2 M. & K. 441; *Westwood v. Southey*, 2 Sim. N. S. 192; *Turner v. Frampton*, 2 Coll. 331.

When survivorship refers to the failure of issue.

But if survivor means not the person surviving the failure of issue but the longest liver of the legatees, so that one legatee surviving another would take a transmissible interest before the failure of issue, the failure of issue will not be restricted. *Chadock v. Cowley*, Cro. Jac. 695.

When survivorship is merely among the legatees.

It is submitted that, where the meaning of survivors is clear, words of limitation superadded are immaterial; but where it is doubtful whether the survivorship contemplated is between the legatees or is to be referred to the period of failure of issue, words of limitation superadded afford a strong argument that the former was intended. *Massey v. Hudson*, 2 Mer. 130; *O'Donohoe v. King*, 8 Ir. Eq. 185.

Effect of words of limitation.

Upon the same principle, in all those cases where survivors would be read others, or there is an intention to benefit not merely the persons who survive the failure of issue, but their *stirpes*, the failure of issue will not be restricted. *Roe v. Scott*, Fearn, C. R. 473, n.; *Taylor v. Walker*, 13 W. R. 986;

When survivorship is referrible to the *stirpes*.

Chap. XLII. *Assignees of Leadbeater*, I R. 8 Eq. 422 ; see, too, *M'Clenaghan v. Bankhead*, I R. 8 C. L. 195.

Gift over in default of issue to a named person. 8. There is no authority for saying that a gift on failure of issue to A., a definite named person without more, would have the effect of restricting the failure of issue. *Lord Beauclerk v. Dormer*, 2 Atk. 307 ; *Barlow v. Saker*, 17 Ves. 479 ; see *Fearne C. R.* 481.

Intention to confer personal enjoyment. On the other hand, a gift in default of issue of A. to two persons, or such of them as should be then living, has been held sufficient to show that the testator meant a personal enjoyment by the legatees and could not therefore have intended a general failure of issue. *Wilson v. Chestnut*, I R. 1 Eq. 559. Perhaps *Roe d. Sheers v. Jeffery*, 7 T. R. 589, may stand on this ground. *Jones v. Cullimore*, 3 Jur. N. S. 404, where the gift was on failure of issue to such of my children as may be then living, and if none should be then alive to a person named and a class, must probably be supported on the ground that the testator showed by the gift to children then living that he did not intend an indefinite failure of issue, and not on the ground that the ultimate gift was to a definite person.

Where the subsequent estates are all for life. 9. Perhaps failure of issue would be restricted if the subsequent estates are all given to living persons for life only. *Roe d. Sheers v. Jeffery*, 7 T. R. 589 ; see *Trafford v. Boehm*, 3 Atk. 440.

When the estate is *pur autre vie*. 10. If the estate devised is *pur autre vie* a limitation over in default of issue is good, since it cannot be held to mean a failure, which might take place after the determination of the estate. *Croly v. Croly*, Batty, 1 ; *Manning v. Moore*, Alc. & Nap. 96 ; *Lee v. Flinn*, *ib.* 418.

Devise on a general failure of issue of a reversion dependent on failure of certain lines of issue. 11. If the property devised is a reversion which comes into possession only after the failure of issue of some person, a devise of such reversion after failure of the issue in question is in effect an immediate devise of the reversion and therefore valid. And even if the event upon which the reversion is expressed to be devised is larger than and includes the event upon which it comes into possession, the devise will be good if in effect the two events are the same, and the intention is merely to devise the reversion. If, for instance, the reversion falls into possession

on failure of issue by a particular wife of the testator and the testator devises it upon a general failure of issue, the devise is good, as the birth of issue by a second marriage would revoke the will. *Jones v. Morgan*, Fearne, C. R. App. 577; 3 B. P. C. 322; *Lytton v. Lytton*, 4 B. C. C. 441.

In the same way, if the testator erroneously recites that he is entitled to the reversion of certain estates on the death of a son without issue generally, and then devises the reversion on failure of such issue, the devise is good, the intention being clear to devise the reversion. *Lewis v. Templer*, 33 B. 625; see *Bankes v. Holme*, 1 Russ. 394, *n*.

But a mere devise of a reversion upon a failure of a larger class of issue than that upon which it is limited, will not operate as an immediate devise of the reversion. *Lady Lanesborough v. Fox*, Ca t. Talb. 262.

CHAPTER XLIII.

SHIFTING CLAUSES.

Chap. XLIII.

WHERE estates are given by will, and there is a clause shifting the lands if the devisee comes into possession of estates previously settled, the estates go over if the event happens. *Cope v. Earl de la Warr*, 8 Ch. 982.

Life estate coming into possession in event upon which the shifting clause is to take effect.

And the shifting clause will operate upon the life interest of a tenant for life, though his interest is such, that if he comes into possession of the settled estates, his life interest under the will must at the same time come into possession; so that, in effect, the gift of the life interest is nugatory. *Lambarde v. Peach*, 4 Dr. 553 ; 1 D. F. & J. 495.

Possession of settled estates *prima facie* refers to possession under the settlement.

When estates devised by will are directed to shift on the devisee coming into possession of settled estates, the presumption is that the testator means a possession under the settlement; and, therefore, if the devisee comes into possession of the settled estates not under the settlement, but under an entirely new title, for instance, under the will of a tenant in tail, who had barred the entail, the shifting clause will not take effect. *Taylor v. Earl of Harewood*, 3 Ha. 372; *Wandesforde v. Carrick*, 1 R. 5 Eq. 486.

A fortiori, where the shifting clause is to take effect on the devisee becoming entitled to other estates under any existing or future will or settlement and he becomes entitled by descent from his father, though the latter took under a will, the devised estates will not shift. *Walmesley v. Gerard*, 29 B. 321.

Meaning of "entitled."

The term entitled would in such a clause mean entitled in possession. *Umbers v. Jaggard*, 9 Eq. 200; see *Gryll's Trusts*, 6 Eq. 589; *Abbiss v. Burney*; *In re Finch*, 17 Ch. D. 223.

A shifting clause which affects "any person for the time being entitled to the possession or to the receipt of the rents and profits" of devised hereditaments does not apply to an infant, where by a clause in the will possession is given to trustees during his minority. *Leslie v. Earl of Rothes*, (1894) 2 Ch. 499.

Chap. XLIII.

If the devisee takes the settled estates not under the settlement existing at the date of the will, but under a resettlement, which can be looked upon as a continuation of the old title, the devisee taking the same interest under the resettlement as he would have taken under the old settlement, except so far as his interest has been diminished for his own benefit, the shifting clause takes effect. *Harrison v. Round*, 2 D. M. & G. 190; see *In re Croker's Estate*, I. R. 2 Eq. 58; *Wright v. Marshall*, 51 L. T. 781.

Whether a devisee taking settled estates under a resettlement is within a shifting clause.

If the devisee takes under the resettlement a diminished interest in the settled estates or the estates themselves are diminished in quantity, the shifting clause has no effect. *Fazakerley v. Ford*, 4 Sim. 390; 1 A. & E. 897; *Gardiner v. Jellicoe*, 12 C. B. N. S. 568; *Meyrick v. Laws*, 9 Ch. 237.

On the other hand, if the testator expressly gives directions to have a portion of the settled estates settled to other uses, the devolution of the settled estates to the devisee diminished by that portion will not prevent the operation of the shifting clause. *Micklethwait v. Micklethwait*, 4 C. B. N. S. 790; see *Stacpoole v. Stacpoole*, 2 Con. & Law. 489, 501.

The shifting clause will not, in the absence of a clear intention, take effect where the devisee has only an interest in remainder in the settled estates. *Monypenny v. Dering*, 2 D. M. & G. 145; *Curzon v. Curzon*, 1 Giff. 248; *Bagot v. Legge*, 34 L. J. Ch. 156; 12 W. R. 1097.

Operation of a shifting clause where a devisee has only remainder in settled estates.

As to the repeated operation of a shifting clause, see *Doe d. Lumley v. Earl of Scarborough*, 3 A. & E. 2, 897; *Monypenny v. Dering*, 2 D. M. & G. 145.

It seems a shifting clause would not avoid jointures and portions properly charged upon the estates previous to their shifting. *Holmesdale v. West*, 12 Eq. 280.

Where an estate devised by will is directed upon the devolu-

In what case

Chap. XLIII.

estates
directed to
shift to the
next re-
mainder-man
will go to the
trustees to
preserve.

tion of settled estates to the devisee to go over to the next remainder-man, as if the tenant for life were dead, the estate will shift to trustees to preserve contingent remainders where there are contingent remainders to unborn sons of the tenant for life whose life estate has ceased; though, strictly speaking, if the tenant for life were dead, the estate of the trustees to preserve would also be at an end. *Doe v. Heneage*, 4 T. R. 13; see the opinion of Fearne, C. R. App. No. 6; *Stanley v. Stanley*, 16 Ves. 491; *Morrice v. Langham*, 11 Sim. 260; 12 Sim. 615; and see 11 Cl. & F. 667; *Lambarde v. Turton*, 4 Dr. 553; 1 D. F. & J. 495; see *Lord Kenlis v. Earl of Bective*, 34 B. 587.

Who is
entitled to
the inter-
mediate rents.

As to whether the heir or remainder-man is entitled to the rents during the period between the shifting of the estate to the trustees and the birth of issue to take, it seems that a direction that the rents may be applied for the maintenance of a remainder-man, even during the lifetime of a tenant for life, would be sufficient to show that the rents were not to go to the heir. *Turton v. Lambarde*, 1 D. F. & G. 495 (judgment of the L. J. Turner); *D'Eyncourt v. Gregory*, 34 B. 36.

On the other hand, in the absence of some such intention, they would go to the heir. *Stanley v. Stanley*, 16 Ves. 491; and see *per* Kindersley, V.-C., *Lambarde v. Peach*, 4 Dr. 553.

Estate
directed to
shift as if the
devisee were
dead without
issue.

When the devised estate is directed to go over, as if the person becoming entitled to the settled estates were dead without issue, the next remainder-man takes on the event happening. *Morrice v. Langham*, 8 M. & W. 194.

In such case
trustees to
preserve will
not take.

And in such a case, if the next limitations in remainder are contingent, the estates will not go to trustees to preserve contingent remainders during the life of the person from whom the estate is shifted, since their estate would in any event be inadequate to support contingent remainders limited upon a failure of issue of such person after his death. *Carr v. Earl of Errol*, 6 East, 58.

When the devised estates are directed to go to the next remainder-man, as if the person taking the benefit upon the accruer of which the estate is to shift were dead without issue, the construction will not be influenced by the fact that the

younger children of the person from whom the estates shift may happen to take no benefit under the settlement. *Doe d. Lumley v. Earl of Scarborough*, 3 Ad. & E. 1. Chap. XLIII.

But where estates were devised to several sons successively in tail male, with remainder to the children of the sons in tail general, with remainder over, and the estates were directed to go over upon the acquisition of settled estates (which could not go to any female issue of the testator's sons), as if the person taking the settled estates were dead without issue, the words "without issue" were confined to issue capable of taking under the limitations of the devised estate preceding the next remainder. *Gardiner v. Jellicoe*, 12 C. B. N. S. 568; 11 H. L. 323. Issue limited to issue capable of taking under the limitation of the devised estate preceding the next remainder.

CHAPTER XLIV

GIFTS BY REFERENCE.

Chap. XLIV.

Chattels given
to a person to
go as heir-
looms.

A BEQUEST of chattels to a person and his heirs or successors to go according to the limitations of real estate or as heirlooms vests absolutely in the person named, whether such words as "so far as the rules of law and equity permit," or "to be enjoyed and go with the title," are added or not. The Court, in fact, refuses to treat such a bequest as executory. *Rowland v. Morgan*, 6 Ha. 463 ; 2 Ph. 764 ; *In re Johnston* ; *Cockerell v. Earl of Essex*, 26 Ch. D. 538.

The cases of *Gower v. Grosvenor*, Barn. 54 ; 5 Mad. 337, and *Trafford v. Trafford*, 3 Atk. 347, so far as they express a contrary opinion, are overruled.

Chattels to go
with a title.

In the same way a gift of chattels to such persons as should from time to time be the holders of a title, so far as the rules of law permit, vests absolutely in the first holder of the title after the testator's death, though he may have been born at the testator's death, and could, therefore, have been cut down to a life interest. *Tollemache v. Coventry*, 2 Cl. & F. 611 ; 8 Bl. N. S. 547 ; *In re Viscount Exmouth* ; *Exmouth v. Praed*, 23 Ch. D. 158.

Chattels to go
as heirlooms
with realty.

A gift of personalty as heirlooms to the persons for the time being entitled to real estate, so far as the rules of law and equity permit, vests absolutely not in a tenant for life of the real estate, but in the first tenant in tail at birth, whether he comes into possession or not. *Trafford v. Trafford*, 3 Atk. 347 ; *Vaughan v. Burslem*, 3 B. C. C. 101 ; *Foley v. Burnell*, 1 B. C. C. 274 ; 4 B. P. C. 319 ; *Carr v. Lord Errol*, 14 Ves.

478 ; *Lord Scarsdale v. Curzon*, 1 J. & H. 40 ; *In re Johnson's Trust*, L. R. 2 Eq. 716 ; see *Miller v. Stanley*, 12 W. R. 780. Chap. XLIV.

But the chattels will not vest in a tenant in tail whose estate is liable to be divested by the birth of issue to take under prior limitations and who dies before his estate becomes indefeasibly vested. *Hogg v. Jones*, 32 B. 45.

A direction that the personalty is not to vest in a tenant in tail dying under twenty-one will be construed as referring to a tenant in tail by purchase under the will, and will prevent the personalty from vesting in a tenant in tail by purchase dying an infant. *Christie v. Gosling*, L. R. 1 H. L. 279 ; *Harrington v. Harrington*, L. R. 5 H. L. 87. Direction against vesting under 21.

If the direction is that a tenant in tail in possession who dies under twenty-one shall not be entitled to the personalty, but that the personalty shall belong only to such person as shall first attain twenty-one and become entitled to an estate tail in possession in the real estate, the words "in possession" will not be strictly construed ; but if a first tenant in tail in remainder dies under twenty-one, the personalty will vest in the next tenant in tail in remainder who attains twenty-one. *Foley v. Burnell*, 1 B. C. C. 274 ; 4 B. P. C. 319 ; *Martelli v. Holloway*, L. R. 5 H. L. 532. Direction as to possession.

If the gift of the chattels is to the person actually seised at the death of tenants for life, or to the person seised of the actual freehold which is defined as freehold in possession, or there are other clear words referring to actual possession, a tenant in tail who dies before coming into possession is excluded. *Potts v. Potts*, 3 J. & Lat. 353 ; 9 Ir. E. 577 ; 1 H. L. 671 ; *Lord Scarsdale v. Curzon*, 1 J. & H. 40 ; see *Cox v. Sutton*, 25 L. J. Ch. 845. Reference to actual possession.

In such a case, if the tenant for life and the first tenant in tail bar the entail, but the first tenant in tail dies before the tenant for life, the chattels go to the person who would have come into possession if the estate tail had not been barred. *Hogg v. Jones*, 32 B. 45.

Where chattels were settled to go along with real estate, and the testator directed that in a certain event the personal estate should go over as if the tenant in tail were dead without issue,

T.W.

Q Q

Chap. XLIV. it was held that the condition of defeasance applied to a tenant in tail who had barred the entail. *In re Cornwallis; Cornwallis v. Wykeham-Martin*, 32 Ch. D. 388.

Proviso
divesting
estate must
not be
uncertain.

A declaration that no person in existence at the testator's death or born in due time afterwards should have more than a life interest in the chattels, and so that no person should acquire an absolute interest till the expiration of twenty-one years after the decease of all persons in existence at the testator's death and afterwards attaining the title, was held to be void for uncertainty. *In re Viscount Exmouth; Exmouth v. Prued*, 23 Ch. D. 158.

Where chattels are given to the person or persons in actual possession of land, to go as far as the rules of law and equity permit, but so as not to vest in any person becoming entitled to an estate of inheritance who dies under twenty-one, and the first tenant in tail in possession dies under twenty-one, it seems doubtful whether the chattels are carried on to the next owner within the limits of perpetuity, or whether there would be a lapse. See the opinion of Lord Cairns in favour of an intestacy, and of Lord Westbury in favour of the transmission of the property within the limits of perpetuity, in *Harrington v. Harrington*, L. R. 3 Ch. 564; *ib.* 5 H. L. 87.

Possession
under a deed
not executed.

A gift of chattels to the person entitled under a deed of entail to the possession of a house where the deed referred to had never been executed was held to pass to the person in fact in possession of the house. *In re Marquess of Bute; Marquess of Bute v. Ryder*, 27 Ch. D. 197.

Bequests "in
the same
manner" as
prior be-
quests.

When a bequest has been made to several persons as tenants in common for life with remainder to their children and there is a subsequent gift to the same persons *in the same manner* as the prior bequest, the second bequest will be subject to the same limitations for life and remainders over. *Milsom v. Awdry*, 5 Ves. 465; *Eames v. Anstee*, 33 B. 264; *Smith v. Greenhill*, 14 W. R. 912; *Giles v. Melsom*, L. R. 6 H. L. 24.

In *Sweeting v. Prideaux*, 2 Ch. D. 413, a subsequent gift for the life of the legatee only "in the same manner in every respect and subject to the same control" as the prior gift, was

held on the language of the will to import the limitation in remainder of the prior gift to the children of the legatee. See Chap. XLIV
Auldjo v. Wallace, 31 B. 193; *Re Smith*; *Bashford v. Chaplin*, 45 L. T. 247.

If, however, the original gift is directed to fall into the residue in default of children and the residue is then given to the same persons "in the same manner," these words will be referred, if possible, to a tenancy in common or separate use. *Shanley v. Baker*, 4 Ves. 731.

And where the original gifts are absolute, subject to executory gifts over, a subsequent gift to be held "in the same manner" as the prior gift will not import the executory gifts over if the words can be referred to a tenancy in common. *Lumley v. Robbins*, 13 Ha. 621; and see *Hare v. Hare*, 24 W. R. 575.

A gift to A, subject to the conditions in the will named, includes conditions comprised in a codicil. *Stretton v. Fitzgerald*, 23 L. R. Ir. 310, 466.

The referential words may, however, be strong enough to import all the limitations and restrictions of the preceding gift. *Ross v. Ross*, 2 Coll. 269; *Re Colshead*, 2 De G. & J. 690; *Re Shirley's Trusts*, 32 B. 394; *Ord v. Ord*, L. R. 2 Eq. 393; *Re Lindo*; *Askin v. Ferguson*, 59 L. T. 462.

Gift by reference may import all the limitations of a prior gift.

When there is a gift to a class of persons living at a particular time, and a subsequent gift to the same class without the restriction of being alive at the particular time "in the same manner" as the prior gift, this will not cut down the class to take the second gift. *Yardley v. Yardley*, 26 B. 38; *Pigott v. Wilder*, 26 B. 90; *Re Wilder's Trusts*, 27 B. 418.

But there may be words which will have this effect. *Swift v. Swift*, 11 W. R. 334; 32 L. J. Ch. 479.

For the construction of a gift upon the trusts of a settlement under which appointments with hotchpot clauses had been made, see *Smyth-Pigott v. Smyth-Pigott*, W. N. 1884, 149.

When property is given upon the same trusts as other property which is subject to a power to raise a definite sum, the property so given by reference is not subject to an additional charge of the same amount. *Hindle v. Taylor*, 5 D. M. & G. 577, 599; *Boyd v. Boyd*, 9 L. T. N. S. 166; 2 N. R. 486; *Baskett v. Lodge*,

Reduplication of charges.

Chap. XLIV. 23 B. 138; see *Sambourne v. Barry*, 11 R. 11 Eq. 140; *Re Berners*; *Berners v. Calvert*, 67 L. T. 849; 3 R. 153; 41 W. R. 188. See *Trew v. Perpetual Trust Co.*, 11 T. L. R. 259.

But if the power is to raise a charge not exceeding a certain proportion of the value of the property, the power to charge is increased in proportion by the value of the added property. *Cooper v. Macdonald*, 16 Eq. 258.

Gift to persons "before named."

It may be noticed that a bequest to persons "before named" may refer to persons before mentioned, and will not without more be confined to persons expressly mentioned by name. *In re Holmes*, 1 Dr. 321; *Bromley v. Wright*, 7 Ha. 334; *Seale-Hayne v. Jodrell*, (1891) A. C. 304.

A gift "amongst my relations hereafter named" where none are subsequently named is void for uncertainty. *Crampton v. Wise*, 58 L. T. 718.

CHAPTER XLV.

EXECUTORY TRUSTS.

EVERY trust which requires a future conveyance or settlement is so far executory; but the mere fact that the testator contemplates a future settlement will not justify the Court in putting upon the words of a testator any other than their legal meaning.

Chap. XLV.

Executory trusts defined.

When the testator, though contemplating the execution of a future instrument, declares the trusts upon which the property is to be held by reference to another instrument, those trusts are looked upon as incorporated into the will and must have their ordinary legal meaning. *Christie v. Gosling*, L. R. 1 H. L. 279; see *Viscount Holmesdale v. West*, L. R. 3 Eq. 474.

If the testator himself declares the trusts to be inserted in the contemplated settlement, the question then is, "whether he has been his own conveyancer," in which case the trusts declared by him must be literally followed, or whether the trusts declared by him are merely the headings of a future settlement, in which case they will be so carried out as to effectuate his intention. See *Egerton v. Earl Brownlow*, 4 H. L. 1, 210; *Austen v. Taylor*, 1 Ed. 361; Amb. 376; *Boswell v. Dillon*, Dru. t. Sug. 291; *In re Nelly's Trusts*, 26 W. R. 88; *In re Parrott*; *Walter v. Parrott*, 33 Ch. D. 274.

Thus a direction to purchase lands to be held on the trusts declared with respect to other lands must be obeyed by literally adopting those trusts. *Austen v. Taylor*, 1 Ed. 361; Amb. 376.

In marriage articles the purpose of the instrument is itself sufficient to indicate the settlor's intention that the property is to go in strict settlement, but in a will an intention that words

Distinction between marriage articles and wills.

Chap. XLV.

are not to have their strict meaning must appear from the instrument itself. Therefore, though the trust is executory, a direction to settle property on A. and the heirs of his body: *Seale v. Seale*, 1 P. W. 291; *Samuel v. Samuel*, 14 L. J. Ch. 222; 9 Jur. 222; or a devise in trust for A., with a direction to make a proper entail to the male heir by him, will not cut down A. to less than an estate tail. *Blackburn v. Stables*, 2 V. & B. 367; *Sweetapple v. Bindon*, 2 Vern. 536; *Harrison v. Naylor*, 2 Cox, 247; *Randall v. Daniell*, 24 B. 193; *Marshall v. Bousfield*, 2 Mad. 166; and see *Jervoise v. Duke of Northumberland*, 1 J. & W. 599; *Lowry v. Lowry*, 13 L. R. Ir. 317.

How far the rule in Shelley's case applies to executory trusts.

If, however, an intention is manifested not to use words in their strict legal sense, the trust will be executed so as to effect the general intention.

Such an intention is sufficiently indicated if the limitation is to A. for life, remainder to his heirs: *Meure v. Meure*, 2 Atk. 265; *Papillon v. Voice*, 2 P. W. 471; *Stonor v. Curwen*, 5 Sim. 264; *Hadwen v. Hadwen*, 23 B. 551; *Bastard v. Proby*, 2 Cox, 6; *Rochfort v. Fitzmaurice*, 2 D. & War. 1; *Trevor v. Trevor*, 1 H. L. 239; by a direction that the first taker should be unimpeachable for waste: *Papillon v. Voice*, 2 P. W. 471; *Fearne, C. R.* 115; by a direction that he shall not have power to bar the entail: *Leonard v. Earl of Sussex*, 2 Vern. 526; *Fearne, C. R.* 115; or that the property shall go over if the first taker dies without issue: *Shelton v. Watson*, 16 Sim. 543; *Thompson v. Fisher*, 10 Eq. 207; by the insertion of a general limitation to preserve contingent remainders not limited to a life: *Venables v. Morris*, 7 T. R. 342, 438; *Doe d. Compere v. Hicks*, 7 T. R. 433; by a direction that a settlement shall be made as counsel shall advise and that issue are to take in succession, and according to priority. *White v. Carter*, 2 Ed. 366.

And the same result, it seems, will follow if the general scope of the limitations shows that they were not to be literally adhered to. *Parker v. Bolton*, 5 L. J. Ch. 98; *Duncan v. Bluett*, 1. R. 4 Eq. 469.

Direction to make a strict entail.

As to the effect of a direction to make a strict entail, see *Graves v. Hicks*, 11 Sim. 536; *Sealey v. Starwell*, 1. R. 2 Eq. 326.

An executory trust to settle property upon such trusts as would correspond with the limitations of a barony granted by letters patent to several persons in succession and the heirs male of their bodies respectively, will be limited so as to give them only estates for life, the title being inalienable. *Sackville-West v. Viscount Holmesdale*, L. R. 3 Eq. 474; *ib.* 4 H. L. 543; *Lord Dorchester v. Earl of Effingham*, Sir G. Coop. 319; 10 Sim. 587, *n.*; 3 B. 180, *n.*; *Woolmore v. Burrows*, 1 Sim. 512; *Bankes v. Baroness Le Despencer*, 10 Sim. 576.

Chap. XLV.

Direction to settle property to go with a title.

It is clear that where chattels are directed to go as heirlooms with real estate "as far as the rules of law and equity permit," these words will not make the trust executory, or enable the Court to mould the limitations of the personalty. *Christie v. Gosling*, L. R. 1 H. L. 279; *In re Johnston*; *Cockerell v. Earl of Essex*, 26 Ch. D. 538.

The words "as far as the rules of law permit" will not make a trust executory.

But if such a trust is executory the Court will mould it so as to prevent the absolute vesting of chattels in a tenant in tail dying before coming into possession. See *Lady Lincoln v. Duke of Newcastle*, 12 Ves. 226, and see per Lord Chelmsford in *Christie v. Gosling*, L. R. 1 H. L. 290; *Sackville-West v. Viscount Holmesdale*, L. R. 4 H. L. 543; see *Montagu v. Lord Inchiquin*, 23 W. R. 592.

Effect of such words where the trust is executory.

If there are shifting clauses as to the realty which would be void for remoteness as to the personalty, they will be moulded so as to carry out the intention. *Miles v. Harford*, 12 Ch. D. 691.

The Court will carry out in strict settlement an executory trust of family jewels directed to go as heirlooms to a succession of eldest sons "as far as the rules of law and equity will permit," though unconnected with limitations of real estate, and will insert provisoes against vesting in any person who does not become entitled to possession and attain twenty-one. *Shelley v. Shelley*, 6 Eq. 540.

A gift to a female legatee, followed by a direction to settle it on her upon marriage, probably imports no more than a separate use, so that the legatee, whether married or not, is entitled to payment on her separate receipt. *Laing v. Laing*, 10 Sim. 315; *Magrath v. Morehead*, 12 Eq. 491. See *Kennerley v. Kennerley*, 10 Ha. 160; *Munt v. Glynes*, 41 L. J. Ch. 639.

Direction to settle.

Chap. XLV.

Direction to
settle strictly.

If the direction is to make a *strict* settlement, but no intention is shown to benefit children, the property will be settled upon the legatee in such a way as to exclude her husband and children. *Loch v. Bagley*, 4 Eq. 122.

But a direction to settle a legacy upon the legatee by her settlement has been held to import the usual trusts of a marriage settlement, including trusts for children. *Duckett v. Thompson*, 11 L. R. Ir. 424.

Intention to
benefit
children.

If an intention is shown that the children of the legatee are to be benefited, the settlement will contain a power of appointment in the legatee with limitations in default of appointment in favour of children who, being males, attain twenty-one, or, being females, attain twenty-one or marry as tenants in common. *Young v. Macintosh*, 13 Sim. 445; *Stanley v. Jackman*, 23 B. 450; *Taggart v. Taggart*, 1 Sch. & L. 84; *Cogan v. Duffield*, 2 Ch. D. 44; see *Oliver v. Oliver*, 10 Ch. D. 765; *Eustace v. Robinson*, 7 L. R. Ir. 83; *In re Gowan*, 17 Ch. D. 778.

But no power of appointment will be given where an intention is shewn that the children are to take equally. *In re Parrott*; *Walter v. Parrott*, 33 Ch. D. 274.

Intention to
benefit hus-
band.

Where there is an intention to benefit a husband or wife, the husband and wife will take a joint power of appointment. *In re Gowan*; *Gowan v. Gowan*, 17 Ch. D. 778.

If the trustees have a discretion as to the form of settlement a power may be inserted enabling the legatee to appoint a life interest to a husband. *Charlton v. Rendall*, 11 Ha. 296.

Where a testator directed £10,000 to be settled upon a married daughter; "at her death £8000 of the above sum to be divided equally amongst her children, and the remaining £2000 to be given to her husband, if living," it was held that the gift must be confined to her then husband and her children by him. *In re Parrott*; *Walter v. Parrott*, 33 Ch. D. 274.

But where the testator, by a gift over if the legatee died "without leaving any issue her surviving" showed that he contemplated children by any marriage taking, it was held that a gift of a life interest to the legatee's husband included a second husband. *Nash v. Allen*, 42 Ch. D. 54.

Ultimate
trusts.

Under a direction to settle for the benefit of the legatee and

her issue to the exclusion of a husband, the ultimate trusts will be for the appointees of the legatee by will and in default of appointment for her absolutely. *Stanley v. Jackman*, 23 B. 450.

Chap. XLV.

A covenant in executory marriage articles to settle real estate on issue will be carried out by successive limitations to the first and other sons, and so on. *Dod v. Dod*, Amb. 274; *Hart v. Middlehurst*, 3 Atk. 373; *Phillips v. James*, 13 W. R. 934; *In re Grier*, I. R. 6 Eq. 386.

In the execution of executory trusts by the Court the question arises whether the tenants for life are to be dispunishable for waste or not.

In what cases tenants for life will be unimpeachable for waste.

1. Where the executory trust is in such a form as would give the first taker an estate of inheritance, but the general object of the trust can only be effected by cutting down that estate to an estate for life, the life estates are made unimpeachable for waste. *Leonard v. Earl of Sussex*, 2 Vern. 526; *White v. Briggs*, 15 Sim. 17; 2 Ph. 583.

And, therefore, where estates are directed to go to the support of a title granted to a man and the heirs of the body, the estate of the first taker being cut down to a life estate in execution of the trust, will be dispunishable for waste. *Woolmore v. Burrows*, 1 Sim. 512; *Bankes v. Baroness Le Despencer*, 10 Sim. 576; 11 Sim. 508; *Sackville-West v. Viscount Holmesdale*, L. R. 4 H. L. 543.

A direction that the trust is to be executed in strict settlement without more, *i.e.*, where no estate for life is expressly given, implies that the estates for life are to be dispunishable for waste. See *Davenport v. Davenport*, 1 H. & M. 775.

And, upon the same principle, if the trust is to be executed in strict settlement, powers which would diminish the estate will not be inserted under a direction to insert the usual powers. *Higginson v. Barneby*, 2 S. & St. 516; see *Sackville-West v. Viscount Holmesdale*, *supra*.

2. But if the testator has expressly, or by reference to other trusts, directed a life estate to be given, the power to commit waste will not be added to the life estate. *Davenport v. Davenport*, 1 H. & M. 775.

Chap. XLV.

And if life estates are directed by the testator to be given, the words "in strict settlement" will not make the life estates punishable for waste. *Stanley v. Coulthurst*, 10 Eq. 259.

A direction to settle without power of anticipation is inconsistent with a power to commit waste. *Clive v. Clive*, 7 Ch. 433.

Restraint
upon antici-
pation.

Property to be settled to the separate use of a married woman will be settled with a restraint upon anticipation. *Turner v. Sargent*, 17 B. 515; *Stanley v. Jackman*, 23 B. 450; *Re Dunnill's Will*, I. R. 6 Eq. 322; see *Symonds v. Wilkes*, 11 Jur. N. S. 659; *In re Parrott*; *Walter v. Parrott*, 33 Ch. D. 274.

Real estate directed to be settled will be settled as realty. *Turner v. Sargent*, 17 B. 515.

What powers
will be in-
serted in a
settlement
executed by
the Court.

A simple direction to settle will, it seems, authorise the insertion of powers of management, such as powers of leasing, and sale and exchange. *Turner v. Sargent*, 17 B. 515; *Wise v. Piper*, 13 Ch. D. 848.

And where "usual powers" are expressly authorised, powers of leasing, of sale and exchange, and, if necessary, of partition and of leasing mines and of granting building leases, will be inserted, but not powers to confer personal privileges upon particular persons. *Peake v. Penlington*, 2 V. & B. 311; *Hill v. Hill*, 6 Sim. 136; see *Duke of Bedford v. Marquis of Abercorn*, 1 M. & Cr. 312, p. 334; *Higginson v. Barneby*, 2 S. & St. 516; *In re Grier*, I. R. 6 Eq. 386.

Where certain powers are given to tenants for life if qualified, and if not qualified, to trustees for them, general words will not authorise powers of sale and exchange. *Brewster v. Angell*, 1 J. & W. 625; *Horne v. Barton*, Jac. 437.

And where certain powers are given, general words will, as a rule, authorise only powers of a like nature; they will not, for instance, authorise the insertion of a power to grant building leases when a power to lease is expressly given. *Pearce v. Baron*, Jac. 158.

The general words may, however, be so placed as to show that their generality is not to be controlled. *Lindon v. Fleetwood*, 6 Sim. 152.

CHAPTER XLVI.

IMPLICATION.

IMPLICATION OF ESTATES TAIL.

IF there is a devise to A. simply, or to A. for life, followed by a gift over in default of issue, if these words import an indefinite failure of issue, A. takes an estate tail. *Machell v. Weeding*, 8 Sim. 4; *Daintry v. Daintry*, 6 T. R. 307; *In re Banks' Trusts*, 2 K. & J. 387.

Chap. XLVI.

Gift over upon an indefinite failure of issue.

And in wills before the Wills Act, if the limitation is to A. simply, or to A. for life, with a gift over in default of issue, A. will take an estate tail, though there are words which might constructively limit the failure of issue within a definite period, since this is the only construction which will carry anything to the issue. *Wyld v. Lewis*, 1 Atk. 432; *Simmons v. Simmons*, 8 Sim. 22 (where the devise was in effect to A. for life, and if she dies without issue over, the power to appoint to issue being merely discretionary); *Butt v. Thomas*, 11 Ex. 235; 1 H. & N. 109.

The Court will not constructively limit the failure of issue, so as to prevent the implication of an estate tail.

Quære whether an estate tail will be implied in a person, from a gift over in default of his issue simply, where no interest is given to him by the will. *Parker v. Tootal*, 11 H. L. 143; see *Walter v. Drew*, Com. Rep. 373.

Whether an estate tail will be implied from a gift over in default of issue of a person who takes nothing under the will.

And where, in a devise to A. for life, remainder to his children either for life or in tail, an estate tail is implied in A. from a gift over in default of issue, the estate tail so implied will be in remainder, to take effect after the prior estates expressly limited. *Doe d. Bean v. Halley*, 8 T. R. 5; *Doe d. Gallini v. Gallini*, 5 B. & Ad. 621; 3 Ad. & E. 340; *Forsbrook v. Forsbrook*, L. R. 3 Ch. 93; *Andrew v. Andrew*, 1 Ch. D. 410.

Chap. XLVI.

Where in a will after the Wills Act lands were devised to A. "during his life and to his eldest son and his heirs in tail male; and in default of issue" over, an estate in tail male was implied in A. subsequent to the estate in tail male in his eldest son. *Neville v. Thacker*, 23 L. R. Ir. 344.

As between father and son, an estate tail will be implied in the father.

And where an estate tail is to be implied either in an ancestor or his issue, it will be implied in the ancestor, so as to take in the whole line of issue. *Atkinson v. Barton*, 10 H. L. 213; *Forsbrook v. Forsbrook*, *supra*.

IMPLICATION OF LIFE ESTATES.

I. *As regards Real Estate.*

Devise to the heir-at-law after the death of A., gives A. a life estate.

If there is a devise of realty to the heir-at-law after the death of A., A. will take an estate for life by implication. It is evident that the heir who would take in case of intestacy is not meant to take immediately, and the only way of carrying out the testator's intention is to give A. a life estate. "A must have the thing devised or none else can have it." *Gardner v. Sheldon*, Vaughan, 259; Tudor, L. C. 625.

But a devise to a stranger after the death of A. gives A. no estate by implication, since the heir-at-law may have been intended to take in the meantime. *Aspinall v. Petvin*, 1 S. & St. 544.

Person to take on the death of A. must be heir at date of devise.

In order that A. may take a life estate the person to whom the lands are given after the death of A. must be the heir-at-law at the time of the devise, and not at the time when the devise takes effect. *Aspinall v. Petvin*, *supra*.

Devise at the death of A. to one of several co-heiresses.

Similarly, a devise to one of several co-heiresses after the death of A. gives A. a life estate. *Hutton v. Simpson*, 2 Vern. 723, as stated in *King v. Ringstead*, 9 B. & C. 218, p. 228; see *Rhodes v. Rhodes*, 7 App. C. 192.

Devise at the death of A. to the heir and others.

The rule does not apply where the devise is to the heir and others after the death of A. *Ralph v. Carrick*, 11 Ch. D. 873.

Whether an

The express gift of certain lands to A. does not in itself

prevent him from taking other lands by implication. See 13 H. 7, f. 17; Brook, Devise, pl. 52, cited in *Gardner v. Sheldon*, Vaughan, 259; Tudor, L. C. 625, 631.

Chap. XLVI.

express devise to A. will prevent him from taking by implication.

Therefore, where lands are devised to A. for life, and after the death of A. the lands previously devised, together with other lands, are devised to B., A. will or will not take an estate for life by implication in the other lands, according as B. is the heir or a stranger. *Aspinall v. Petvin*, 1 S. & St. 544; *King v. Ringstead*, 9 B. & C. 218; *Attwater v. Attwater*, 18 B. 330.

But words which taken in their grammatical sense are joint and apply to the two classes of property, will be construed distributively if the intention of the testator is manifest that the lands not expressly devised for life are to go to the devisees at once. *Cook v. Gerard*, 1 Saund. 183, cit. 9 B. & C. 225; *Simpson v. Hornsby*, 2 Vern. 723; Prec. Ch. 439, 452; *Doe v. Brazier*, 5 B. & Ald. 64; see *Rhodes v. Rhodes*, 7 App. C. 192, where a devise after the death of A. was held under a peculiar will to vest immediately.

Distributive construction where lands, in some of which A. takes a life estate, are given at his death to the heir.

The mere fact that provision has already been made for A. will be an argument against giving a life estate by implication, and therefore in favour of a distributive construction. See *Stevens v. Hale*, 2 Dr. & Sm. 22; *James v. Shannon*, 1 R. 2 Eq. 118.

Of course, if the devise after the death of A. can be construed as merely postponing the vesting in possession till the death of A., no argument in favour of implication can arise. *Barnet v. Barnet*, 29 B. 239.

No implication where possession postponed till A.'s death.

And in the same way, if there is a residuary devise, so that nothing is undisposed of, there can be no implication. *Horton v. Horton*, Cro. Jac. 74.

Effect of a residuary devise.

II. As regards Personal Estate.

By analogy to the rule with regard to real property, it appears that if personal property be given to the next of kin, after the death of A., A. will take a life interest by implication, if there is no residuary bequest. *Stevens v. Hale*, 2 Dr. & Sm. 22; *Cock v. Cock*, 21 W. R. 807; *Blackwell v. Bull*, 1 Kee. 176.

Bequest of personalty to the next of kin after A.'s death.

Chap. XLVI. In *Horton v. Horton*, Cro. Jac. 74, there was in effect a residuary bequest according to the then state of the law.

A life interest will not be implied in A. where the persons to take on his death are not the next of kin or are the next of kin along with other persons or are only some of the next of kin. *Ralph v. Carrick*, 11 Ch. D. 873; *Woodhouse v. Spurgeon*, 49 L. T. 97; *Greene v. Flood*, 15 L. R. Ir. 450; *In re Springfield; Chamberlin v. Springfield*, (1894) 3 Ch. 603.

In order to imply a life interest in A. there must be something more than a mere gift after his death. Some of the earlier cases in which a life interest has been implied would probably not now be followed. See *Roe v. Summerset*, 5 Burr. 2608; *Bird v. Hunsdon*, 2 Sw. 342; *Humphreys v. Humphreys*, 4 Eq. 475.

Implication
in marriage
settlement.

In the case of marriage settlements settling property on the wife during coverture and providing for her death during the husband's life, with limitations after the death of the survivor, but containing no provision for the event of the wife surviving the husband, a life interest has in that event been implied in the wife. *Tunstall v. Trappes*, 3 Sim. 312; *Allin v. Crawshaw*, 9 Ha. 382.

Intention to
give life
interest.

So in wills after a life interest to A., with a life interest in certain events to B., followed by a gift over after the death of A. and B., a life interest has been implied in B. though the events did not happen. *In re Betty Smith's Trusts*, L. R. 1 Eq. 79; *In re Blake's Trust*, 3 Eq. 799; see *Isaacson v. Van Goor*, 42 L. J. Ch. 193; 21 W. R. 156.

Where the testator's widow was directed to carry on the testator's business and after his death he directed his property to be divided among his children, the widow took a life interest in the property upon the general intention to keep the family together. *Blackwell v. Bull*, 1 Kee. 176; see *Cockshott v. Cockshott*, 2 Coll. 432.

Effect of a
residuary
bequest.

A residuary bequest or a gift in default of appointment where the bequest after the life of A. is made under a power, affords an argument against the implication of a life interest. *Cranley v. Dixon*, 23 B. 512; *Henderson v. Constable*, 5 B. 297.

There is no implication in favour of A. where the gift is if A. dies under twenty-one or unmarried, since in such a case an absolute interest and not a life estate would have to be implied. *James v. Shannon*, I. R. 2 Eq. 118; *Harris v. Du Pasquier*, 20 W. R. 668.

Chap. XLVI.

No implication arises in favour of A., where the gift is, if A. dies under 21, to B.

IMPLICATION OF ABSOLUTE INTERESTS.

1. If there is a gift to A. till twenty-one with a gift over if he dies under twenty-one, A. will take by implication the fee or an absolute interest in personalty, defeasible upon death under twenty-one. *Tomkins v. Tomkins*, cited 1 Burr. 234; *Paylor v. Pegg*, 24 B. 105; *Gardiner v. Stevens*, 30 L. J. Ch. 199; *In re Harrison's Estate*, 5 Ch. 408.

Gift to A. till 21, with a gift over if he dies under 21.

The argument in favour of implication is strengthened if the residuary legatees or devisees are different from those who would take under the gift over, so that without implication the property would go to different persons, according as A. died under or over twenty-one. *Cropton v. Davies*, L. R. 4 Ex. 159.

2. A simple gift to trustees in trust for A. till he attains twenty-one will not give A. the absolute interest. *In re Hedley's Trusts*, 25 W. R. 529; see *McCutcheon v. Allen*, 5 L. R. Ir. 268.

Gift till 21.

But very slight indications of intention have been held sufficient to give the absolute interest, though possibly some of the earlier decisions may be difficult to support.

In some cases the Court has found a direct gift to the legatee, with a superadded direction that it was to be in trust till he should come of age. *Atkinson v. Paice*, 1 B. C. C. 91; *Hale v. Beck*, 2 Ed. 229; see *Tunaley v. Roch*, 3 Dr. 720.

In others an absolute interest has been implied from a direction that the trust is to cease at twenty-one, or from a reference to the trustees as trustees for the legatees. *Peat v. Powell*, Amb. 387; 1 Ed. 479; *Wilks v. Williams*, 2 J. & H. 125.

Or, again, an absolute interest has been given because the trustees are directed to apply not only the interest but the produce till the legatees attain twenty-one. *Newland v. Shephard*, 2 P. W. 194.

Chap. XLVI.

Effect of a gift to A. till 21, for the benefit of himself and another.

No implication in favour of children arises in a gift to A. absolutely, and if he dies without children over.

Gift to A. for life, and if he dies without children over.

3. But the implication will be rebutted if there are circumstances tending to show that the person to take till twenty-one is not to take an absolute interest if he survives twenty-one; if for instance, the gift is to the wife for her and her son's support till the son attains twenty-one, and if he dies under twenty-one, to the wife for life, and then over. In this case the son did not take the whole interest till twenty-one, and it could therefore hardly be implied that he was to take the whole after that age to the exclusion of his mother. *Fitzhenry v. Bonner*, 2 Dr. 36.

4. No implication in favour of children arises upon an absolute gift of personalty to A. and if he dies without children over, or upon a gift to several as tenants in common and if any die without issue their shares to those then living or their children. *Addison v. Busk*, 14 B. 459; 2 D. M. & G. 810; *Cooper v. Pitcher*, 4 H. A. 485; 16 L. J. Ch. 24; *Dowling v. Dowling*, L. R. 1 Eq. 442; *ib.* 1 Ch. 612.

But where there was a gift of a share of residue to A. followed by an accruer clause on his death before the testator "without leaving any children lawfully to inherit," a gift to children was implied. *McClean v. Simpson*, 19 L. R. Ir. 528.

5. Nor does any implication in favour of children arise if the gift is to A. for life and if he dies without children over. *Greene v. Ward*, 1 Russ. 262; *Ranelagh v. Ranelagh*, 12 B. 200; *Sparks v. Restal*, 24 B. 218; *Neighbour v. Thurlow*, 28 B. 33; *Re Hayton's Trusts*, 4 N. R. 54; *Seymour v. Kilbee*, 3 L. R. Ir. 33; *In re Rawlins' Trusts*, 45 Ch. D. 299; *S. C. Scalé v. Rawlins*, (1892) A. C. 342.

So in the case of real estate, a gift over in default of issue of A. following limitations to A. for life with remainder to his first son for life, with remainder to the first son of the first son in tail, with remainder to every other son of A. successively for like interests, will not give the second and other sons of the first son of A. estates by purchase. *Monypenny v. Dering*, 7 Ha. 568.

6. But though after a gift to A. for life the mere gift over in default of children will not be sufficient to give the children any interest by implication, the Court will, it seems, lay hold of any indication of intention to fortify the argument based upon

the gift over, so as to give the children an interest. In the former case, where the absolute interest is given to the first takers, the "mere fact of a testator giving over property in case there are no children does not furnish any presumption on which this Court can act in favour of his giving it to the children, if there are any, as against their parents." *Dowling v. Dowling*, L. R. 1 Ch. 615. But where the parent takes only a life interest the children can take nothing from him, and at the same time, where the gift is of a residue, the presumption against intestacy arises. It seems *Ex parte Rogers*, 2 Mad. 449, may be supported on this ground; see, too, *Kinsella v. Caffray*, 11 Ir. Ch. 154, where the gift over was not merely on death without issue, but upon such death, or upon death leaving issue, and such issue dying under twenty-one, and *Champ v. Champ*, 30 L. R. Ir. 62. See, however, *Scalé v. Rawlins*, (1892) A. C. 342.

7. Possibly where there is a gift to A. to dispose of among a certain class by deed or will, a life interest would be implied in A. *Acheson v. Fair*, 3 D. & War. 527. See *Williams v. Roberts*, 27 L. J. Ch. 177; 4 Jur. N. S. 18; and p. 403, *ante*.

Gift to A. to dispose of among a certain class at his death.

8. A bare power to appoint a sum of money to a particular person will not give that person any interest if the power is not exercised. *Bull v. Vardy*, 1 Ves. Jun. 270; see *Tweedale v. Tweedale*, 7 Ch. D. 633; *In re Brierley*; *Brierley v. Brierley*, 43 W. R. 36.

Bare power to appoint to A.

It would seem that under a power to select a certain number out of a class there is no gift by implication in default of appointment. See *Carthew v. Enraght*, 20 W. R. 743.

Power to select certain number.

If a wide discretion is given to trustees to apply a fund in the maintenance of a son or in augmentation of the shares of the other children, there is no implied gift if the trustees refuse to exercise their discretion. *Re Eddowes*, 1 Dr. & Sm. 395.

Wide discretion not exercised.

If the power is so framed as to impose upon the donee the duty of exercising it, his failure to do so will not prejudice the beneficiaries. *Brown v. Higgs*, 8 Ves. 561; *Burrough v. Philcox*, 5 M. & Cr. 72; *In re Brierley*; *Brierley v. Brierley*, *supra*.

Power in nature of a trust.

And in the ordinary case of a bequest for life with power to T.W.

Power to

Chap. XLVI.
tenant for
life.

the tenant for life to appoint at his death among a class, though the words in which the power is framed may not impose a trust, it seems the beneficiaries who might have taken under the power will take by implication in default of appointment. *Ahearne v. Aherne*, 9 L. R. Ir. 144. *Healy v. Donnery*, 3 Ir. C. L. 213, would probably not be followed.

If there is a gift over in default of objects of the power, it is clear that the objects of the power will take in default of appointment. *Butler v. Gray*, 5 Ch. 26; see *Kellett v. Kellett*, I. R. 5 Eq. 298. This principle does not apply if there is a gift over in default of appointment. *Pattison v. Pattison*, 19 B. 638; *Roddy v. Fitzgerald*, 6 H. L. 823; and see *In re Jeffery's Trusts*, 14 Eq. 136; *Richardson v. Harrison*, 16 Q. B. D. 85.

Nor does it apply where the power is to be exercised only in events which never happen. *Halfhead v. Shepherd*, 28 L. J. Q. B. 248; 5 Jur. N. S. 1162.

And there may be words showing that the power was meant to be merely discretionary; for instance, a statement that the testator does not by his will make any further provision for his children, among whom he empowers his wife to appoint certain property. *Carberry v. McCarthy*, 7 L. R. Ir. 328.

IMPLICATION OF CROSS-REMAINDERS.

Cross-re-
mainders
implied in
devise to
several in
tail, with gift
over in de-
fault of issue
to take under
preceding
limitations.

1. If there is a devise of lands to two or more as tenants in common and the heirs of their bodies respectively, followed by a gift over in default of such issue, the gift over takes effect only in default of all such issue as would take under the antecedent limitations, and therefore cross-remainders are implied between the tenants in tail. *Doe d. Gorges v. Webb*, 1 Taunt. 234; *Powell v. Howells*, L. R. 3 Q. B. 655; *Hannaford v. Hannaford*, L. R. 7 Q. B. 116. See *Askew v. Askew*, 57 L. J. Ch. 629; 58 L. T. 472; 36 W. R. 620.

Where the
gift over is
limited as a
remainder or
reversion.

And if the gift over is limited not expressly in default of issue, but as a remainder, the same result follows. *Doe d. Burden v. Burville*, 2 East, 47, n.

The word reversion would probably now be held to have the same force, notwithstanding *Pery v. White*, Cowp. 777.

The arguments against the implication of cross-remainders founded upon the number of the devisees and such words as severally or respectively, or the fact that *the whole* is not expressly given over, cannot now be considered as having any weight.

2. The result will be the same if the gift over is in default of issue to take under the preceding limitations, living at the death of their parents. *Maden v. Taylor*, 45 L. J. Ch. 569.

3. It has been said that if cross-remainders are provided between certain objects in certain events, the implication of cross-remainders between those objects in different events does not arise; so that, for instance, if cross-remainders are provided between the children of separate families among themselves, cross-remainders would not be implied between the children of one family and those of the other. *Clache's Case* (Dyer, 330), however, which is usually cited on this point, is no authority for any such proposition. All that case decides is, that cross-remainders cannot be implied in the face of an express limitation over in a certain event with which such an implication would be inconsistent. See the remarks by the Lord Justice Turner in *Atkinson v. Barton*, 3 D. F. & J. 339. And the decision in *Rabbeth v. Squire*, 19 B. 77; 4 De G. & J. 406, was based on totally different grounds. The true rule is laid down by Turner, L. J.:—"Cross-remainders are to be implied or not according to the intention. The circumstance of remainders having been created between the parties in particular events is a circumstance to be weighed in determining the intention, but is not decisive upon it." *Atkinson v. Barton*, 3 D. F. & J. 339 (reversed on appeal, but on different grounds, 10 H. L. 313); see, too, *Vanderplank v. King*, 3 Ha. 1; *Re Ridge's Trusts*, 7 Ch. 665; *In re Hudson*; *Hudson v. Hudson*, 20 Ch. D. 406, where the rules deducible from the cases are stated.

4. Cross-remainders will be implied even though, as the result of legal rules and not of the testator's intention, the class of persons between whom they are implied take different interests; if, for instance, some are tenants in tail, others only tenants for life, with remainders to their children in tail. *Vanderplank v. King*, 3 Ha. 1.

Chap. XLVI.

Gift over in default of issue living at deaths of ancestors'

Whether the limitation of cross-remainders in certain events prevents the implication of cross-remainders.

Cross-remainders implied between persons taking different interests.

Chap. XLVI.

Cross-remainders implied between tenants for life.

Cross-remainders implied between the families where the limitations are for life, with remainder to children.

Cross-limitations will not be implied so as to divest vested interests.

5. Cross-remainders will be implied in a devise to the children of A., which carries to them only a life estate, with a gift over for want of such issue of A. *Ashley v. Ashley*, 6 Sim. 358.

6. And where realty or personalty is given to several persons as tenants in common for life with remainders to their issue, followed by a gift over if all should die without leaving issue, cross-limitations between the first takers and their families will be implied. *Re Ridge's Trusts*, 7 Ch. 665; *Re Clark*, 11 W. R. 871; see, too, *Coates v. Hart*, 3 D. J. & S. 504.

7. But cross-limitations will not be implied so as to divest vested interests. The implication arises from the presumption against intestacy, but where there are vested interests there can be no intestacy. See *Rabbeth v. Squire*, 19 B. 70; 4 De G. & J. 406; *Re Clark*, 11 W. R. 871; *Sutton v. Sutton*, 30 L. R. Ir. 251.

Upon the same principle, when the testator has disposed of his whole interest in realty or personalty; if, for instance, absolute vested interests have been given to several as tenants in common, with a gift over upon the death of all in certain events; cross-limitations cannot be implied between them, as there can be no intestacy, and cross-limitations would divest vested interests. *Skey v. Barnes*, 3 Mer. 334; *Bromhead v. Hunt*, 2 J. & W. 459; *Baxter v. Losh*, 14 B. 612; *Beaver v. Nowell*, 25 B. 551.

Gift over of contingent interests, if all the legatees die before the time of vesting.

8. If, however, the interests are not vested, but contingent with a gift over upon the death of all before the interests vest, the argument against an intestacy applies, and no argument can be raised against cross-limitations on the ground that they would divest vested gifts, and therefore in all probability cross-limitations would be implied. *Mackell v. Winter*, 3 Ves. 236, 536; *Scott v. Bargeman*, 2 P. W. 63; 2 Eq. Ab. 542; *Graves v. Waters*, 10 Ir. Eq. 234.

There are no grounds for supposing *Scott v. Bargeman* to be overruled. The point in *Beauman v. Stock*, 2 Ba. & Be. 406, was totally different. It was whether benefit of survivorship would be implied between tenants in common taking vested interests, and the incidental remarks of Lord Manners cannot be considered as overruling a case expressly approved by Lord St.

Leonards in *Vize v. Stoney*, 1 Dr. & War. 348, and followed in *Graves v. Waters*. Chap. XLVI.

As to the circumstances under which cross-remainders apply to an accruer clause, see *Sutton v. Sutton*, 30 L. R. Ir. 251.

IMPLICATION BY RECITAL.

1. A recital, that a person is entitled under another instrument, when he is not in fact entitled, does not in general amount to a gift by the instrument which contains the recital. *Harris v. Harris*, I. R. 3 Eq. 610; *Circuit v. Perry*, 23 B. 275; *Re Bagot*; *Paton v. Ormerod*, (1893) 3 Ch. 348.

A recital that a person is entitled under another instrument.

2. But a recital that the testator has by the very document containing the recital made a particular gift, which he has not in fact made, is evidence of an intention to confer the bounty. *Adams v. Adams*, 1 Ha. 537.

Recital of a supposed gift by the reciting instrument.

Thus a gift alleged to be "in addition" to a prior gift, where there is in fact no such prior gift, is sufficient evidence of an intention to confer the supposed prior gift. *Jordan v. Fortescue*, 10 B. 259; *Farrer v. St. Catherine's Coll.*, 16 Eq. 24.

Gift in addition to a supposed gift.

So a statement that the testator does not give a legatee a certain sum because she is absolutely entitled to it, when in fact it is in the disposition of the testator, amounts to a gift of the sum; *Hall v. Lietch*, 9 Eq. 376; not followed in *Haverty v. Curtis*, (1895) 1 I. R. 23.

But a mere recital in a codicil of a supposed gift by will will not amount to a gift. *Re Arnold's Estate*, 33 B. 163, 171.

3. In order that rule 2 may apply it must be clear that there is nothing in the will to which the recital can refer. *Sherratt v. Oakley*, 7 T. R. 492; *Smith v. Fitzgerald*, 3 V. & B. 2; *Mackenzie v. Bradbury*, 35 B. 617, 620; *Nugent v. Nugent*, I. R. 8 Eq. 78; *Ives v. Dodgson*, 9 Eq. 401.

In order that a recital may operate as a gift, it must be clear that there is nothing to which it may refer.

4. Still less can a gift be implied from a recital when the effect of such implication would be to cut down a prior express gift, as from a recital of a gift to B. for life, remainder to his children, when in fact the prior gift was to the children immediately. *Re Smith*, 2 J. & H. 594.

Recital will not cut down a prior express gift.

CHAPTER XLVII.

REVOCATION.

Chap. XLVII.

Revocation
before the
Wills Act.

PRIOR to the Wills Act a devise was revoked if the testator afterwards made a conveyance of the land for any purpose (except a mortgage), though the conveyance was only of the legal estate. *Lord Lincoln's Case*, Show. P. C. 154; 1 Eq. Ab. 411, pl. 1; 1 Jarm., 4th ed. 147; 5th ed. 128.

Partition was no exception to the general rule where a conveyance was made to a trustee to divide, though, if the partition was effected by a mere release to uses, there was no revocation. *Grant v. Bridger*, L. R. 3 Eq. 347.

Effect of the
23rd section
of the Wills
Act.

Now, by sect. 23 of the Wills Act, it is provided that no conveyance or other act made or done subsequently to the execution of a will of or relating to any real or personal estate therein comprised, except an act by which such will shall be revoked as aforesaid, shall prevent the operation of the will with respect to such estate or interest in such real or personal estate, as the testator shall have power to dispose of by will at the time of his death.

The section
does not
apply to cases
of ademption.

This section applies to cases in which a gift would have been formerly revoked by alteration of estate, but not to cases of ademption. *Moor v. Raisbeck*, 12 Sim. 123; *Ford v. De Pontes*, 30 B. 572.

The subject of revocation of testamentary instruments has been treated *ante*, pp. 35—47. The cases upon revocation as a question of construction are so special that they are of little use as general authorities, and hardly admit of a satisfactory classification.

The following points may, however, be noticed :—

Chap. XLVII.

1. To cut down a previous gift it must be reasonably clear that it was meant to be cut down. The rule is not that the words of revocation must be as clear as the words of original gift. See *Randfield v. Randfield*, 8 H. L. 225; *Wallace v. Seymour*, 20 W. R. 334; *Beamish v. Beamish*, 1 L. R. Ir. 501.

It must be reasonably clear that a bequest is meant to be revoked.

Where a testatrix gave a watch and sum of money to A., and by codicil, after reciting the gift of the watch, revoked the said legacy and declared that her will should be read as if A.'s name had not been inserted therein, it was held that the legacy of money was not revoked. *Re Percival*; *Boote v. Dutton*, 59 L. T. 21.

If property is given to A. for life with remainder for her children, and by a codicil all gifts in favour of A. are revoked, the remainder to the children remains. *Green v. Tribe*, 27 W. R. 39; 47 L. J. Ch. 783.

But if the original gift is to A., followed by a direction to settle it, the gift "to or in favour" of A. is revoked. *Tabor v. Prentice*, 32 W. R. 872.

Where property is given to A. for life with remainders over and the gift to A. only is revoked, but the property is given absolutely to B., the whole original gift is revoked. *Murray v. Johnstone*, 3 D. & War. 143; *Fry v. Fry*, 9 Jur. 894; see *Wells v. Wells*, 2 W. R. 6; 17 Jur. 1020; *Hargreaves v. Pennington*, 12 W. R. 1047.

So, where there is a gift to A. with executory limitations over, and the trusts of the will as regards the gift to A. are revoked, the gifts over are revoked as well. *Boulcott v. Boulcott*, 2 Dr. 25.

A revocation of all devises and bequests in favour of A. revokes a special power of appointment by will given to A. *In re Brough*; *Currey v. Brough*, 38 Ch. D. 456.

Where, under a special power to appoint to her children, a testatrix appointed to them and, upon the death of one of them, she appointed her share to her children, it was held that the appointment by the will was not revoked by the limited appointment by the codicil. *Duguid v. Fraser*, 31 Ch. D. 449.

Chap. XLVII.

Gifts will not be considered revoked further than is necessary.

2. The dispositions of the will will not be disturbed more than is necessary to give effect to a revocation by codicil.

Thus, where a legacy is charged on real and personal estate and the charge on the personal estate is revoked by a codicil, the charge on the realty remains. *Kermode v. Macdonald*, 3 Ch. 585; *Leese v. Knight*, 12 W. R. 1097.

Where a legacy is charged on two funds, one of which is afterwards by a codicil given free from the charge, the charge remains on the other fund and does not abate in the proportion of the two funds. *Tatlock v. Jenkins, Kay*, 654.

So, too, when land is given subject to a charge to A., and the devise is afterwards revoked, the charge remains. *Beckett v. Harden*, 4 Mau. & S. 1; see *Grice v. Funnell*, 1 Sm. & G. 130.

A legacy which is revoked is not set up again because the disposition in favour of which the revocation is made is incomplete or incapable of taking effect. *Tupper v. Tupper*, 1 K. & J. 665; *Nevill v. Boddam*, 28 B. 554; *Quinn v. Butler*, 6 Eq. 225; see *Onions v. Tyrer*, 1 P. W. 343; 2 Vern. 742; *Baker v. Story*, 23 W. R. 147; see *ante*, Ch. VI., p. 40.

Personalty given on trusts of realty which are revoked.

Where personalty is directed to go upon the same trusts as realty, and the trusts of the realty are afterwards revoked or altered, then, if an intention can be gathered from the will and codicil to keep the two classes of property united, the limitations of the personalty will follow the altered limitations of the realty. *Lord Carrington v. Payne*, 5 Ves. 404; *In re Towry's Settled Estate*; *Dallas v. Towry*, 41 Ch. D. 64; see *Re Gibson*, 2 J. & H. 656.

But if no such intention appears, the original gift of the personalty remains. *Lord Beauchamp v. Mead*, 2 Atk. 167; *Darley v. Langworthy*, 3 B. P. C. 359; *Agnew v. Pope*, 1 De G. & J. 49; *Martineau v. Briggs*, 23 W. R. 889; *Bridges v. Strachan*, 26 W. R. 691.

The same principle applies if a legacy is given to a person to be ascertained by reference to trusts which are subsequently altered. *In re Towry's Settled Estate, supra*.

But if the gift is of money to be laid out in repairing certain premises and the surplus is given to the same persons to whom the premises are devised and this latter devise is revoked, the

gift of personalty also fails. *Whiteway v. Fisher*, 9 W. R. Chap. XLVII.
433.

3. A gift by will is not revoked by an erroneous recital of it by a codicil. *Re Smith*, 2 J. & H. 594; *Mann v. Fuller*, Kay, 624. Erroneous
recital will
not revoke a
gift.

But an erroneous recital of a gift does not prevent the revocation of the gift if the subsequent dispositions are inconsistent with it. *Re Margitson*; *Haggard v. Haggard*, 30 W. R. 920; 31 *ib.* 257.

4. An alteration in or addition to a gift in a will expressed to be made upon an assumption of fact, which turns out to be erroneous, does not take effect. *Campbell v. French*, 3 Ves. 321; *Doe d. Evans v. Evans*, 2 Per. & D. 378; 10 Ad. & E. 228; *Barclay v. Maskelyne*, Johns. 124. Alteration
owing to an
erroneous
assumption
of fact.

But if the alteration or addition is made because the testator is doubtful whether some fact is true or not, the alteration takes effect. *A.-G. v. Lloyd*, 3 Atk. 552; 1 Ves. Sen. 32; *A.-G. v. Ward*, 3 Ves. 327.

The distinction seems to be not between the fact and the testator's belief in the fact, but between a fact and a possibility which the testator is unable to verify, and therefore an additional gift founded upon an erroneous belief would fall under the former head. *Thomas v. Howell*, 18 Eq. 198.

INCONSISTENCY.

When two clauses in a will are absolutely irreconcilable the later one is to be preferred. *Crone v. Odell*, 1 Ba. & B. 449; 3 Dow, 61; *Ulrich v. Lichfield*, 2 Atk. 372; *Morrall v. Sutton*, 1 Ph. 533; *Paice v. Archbishop of Canterbury*, 14 Ves. 366. The later of
two inconsis-
tent gifts
takes effect.

But where the testator, using a printed form of will, made two residuary gifts, it was held that the first, which was in his writing, prevailed. *Re Spencer*; *Hart v. Manston*, 54 L. T. 597; 34 W. R. 527.

If possible the Court will reconcile two dispositions apparently inconsistent. See *Kerr v. Baroness Clinton*, 8 Eq. 462; *In re Bywater*; *Bywater v. Clarke*, 18 Ch. D. 17.

Chap. XLVII.

Gift of the same property to two persons.

Thus, if the same property is given to two persons in fee in two different parts of the will, they will take as joint tenants. *Paramour v. Yardley*, Plow. 451; *Bennett's Case*, Cro. Eliz. 9; see *Sherratt v. Bentley*, 2 M. & K. 149, 162.

This does not, however, apply as between will and codicil. *Re Hough's Estate*, 15 Jur. 943; 20 L. J. Ch. 422; *Evans v. Evans*, 17 Sim. 107.

So, too, if land is given to one person without and to another person with words of limitation, the latter will take a fee in remainder. *Gravenor v. Watkins*, L. R. 6 C. P. 500.

Similarly where immediate interests in fee and in tail or in fee and for life are given in the same lands, the devise of the fee will be construed as a remainder whether the devise of the particular estate precedes the devise of the fee or not. *Wallop v. Derby*, Yelv. 209; see *Conquest v. Conquest*, 16 W. R. 453.

Gift of the testator's whole estate, and of a residue in the same will.

In cases where the whole personalty is given to a person absolutely and then there is a gift of the residue at her decease, the earlier gift has been held to be for life only. *Sherratt v. Bentley*, 2 M. & K. 149; *Re Brook's Will*, 13 W. R. 573; *Hare v. Westropp*, 9 W. R. 689.

And the same construction has been adopted where there were no words referring to the death of the first legatee, but the gift was to her children. *In re Bagshaw's Trusts*, 24 W. R. 875; 25 W. R. 659; 46 L. J. Ch. 567.

Gifts of the residue and of the remainder in the same will.

So, if a testator gives the remainder of his property to A. and makes B. his residuary legatee, B. will take only lapsed legacies. *Re Jessop*, 11 Ir. Ch. 424; *Dawes v. Bennett*, 30 B. 226; *Kilvington v. Parker*, 21 W. R. 121; *Bristow v. Masefield*, 31 W. R. 88.

But a residuary gift by codicil revokes a residuary gift by will. *Earl of Hardwicke v. Douglas*, 7 C. & F. 795.

Gifts of all the testator's property, followed by gifts of portions of it.

Similarly where a gift of all the testator's property is followed by gifts of specific portions of it or *vice versa*, both gifts may take effect. *Cuthbert v. Lempriere*, 3 Mau. & S. 158; *Doe d. Snape v. Nevile*, 11 Q. B. 466; *Blamire v. Geldart*, 16 Ves. 814; *In re Arrowsmith's Trusts*, 8 W. R. 555; 2 D. F. & J. 474; *Robertson v. Powell*, 3 N. R. 433.

Where, however, all the testator's personal property was

given to his widow for life, subsequent legacies were held to be not payable till after her death. *Burdett v. Young*, 9 Mod. 93 ; 5 B. P. C. 54. Chap. XLVII

As between a will and codicil, however, the argument is much stronger in favour of revocation. At any rate, where a testator by his will distinguishes between specific legacies and residue and by a codicil gives all his personal property, the codicil revokes the specific legacies as well as the residuary gift. *Kermode v. Macdonald*, L. R. 1 Eq. 457 ; 3 Ch. 584.

As between will and codicil the argument is in favour of revocation.

CHAPTER XLVIII.

ALTERING WORDS—UNCERTAINTY.

CHANGING WORDS.

Chap.
XLVIII.

THE Court will change a word when it appears from the context of the will that the word was incorrectly employed by the testator in place of some other word.

Several cases in which "or" has been changed into "and," and *vice versa*, have already been mentioned in the discussion of the construction of gifts over. It remains to mention some cases in which a similar change has been made in direct gifts.

"Or" will not be changed into "and" in a condition precedent.

When there is a gift to a person upon one or other of two events, "or" will not be read "and," as the result would be to make the conditions cumulative instead of alternative. *Hawksworth v. Hawksworth*, 27 B. 1.

"Nor" may mean "or not."

And it seems in a condition precedent to vesting "nor" will mean "or not," if the result is to vest the gift in either of two events. *Mackenzie v. King*, 12 Jur. 787; 17 L. J. Ch. 448.

"And" changed into "or" upon the context.

On the other hand, in some cases on the context of the will, "and" has been read "or," so as to vest a gift in alternative in lieu of cumulative events. *Hawes v. Hawes*, 1 Ves. Sen. 13; *Jackson v. Jackson*, 1 Ves. Sen. 216; *Stapleton v. Stapleton*, 2 Sim. N. S. 212, with which compare *Malmesbury v. Malmesbury*, 31 B. 407; *Maynard v. Wright*, 26 B. 285.

"Fourth" changed into "Fifth."

Upon the same principle the Court has changed the word fourth into fifth, where it was clear upon the construction of the whole will that the testator intended to refer to the fifth and not to the fourth schedule. *Hart v. Tulk*, 2 D. M. & G. 300. See *Surtees v. Hopkinson*, 4 Eq. 98; *Smith v. Crabtree*, 6 Ch. D. 591; *In re Northen's Estate*; *Salt v. Pym*, 28 Ch. D. 153.

SUPPLYING WORDS.

With regard to supplying words in a will the rule seems to be that where the will as it stands is clearly inconsistent, so that the choice lies between rejecting some portion of it or supplying some word, while at the same time the latter course will make the will consistent, the Court will be justified in making the necessary addition. See *Hope v. Potter*, 3 K. & J. 206; *In re Morony*, 1 L. R. Ir. 483.

Thus, in a devise to A. for life, remainder "to the first son of A. severally and successively in tail male," the devise will be construed as to the first and other sons of A. *Parker v. Tootal*, 11 H. L. 143. See *Newburgh v. Newburgh*, Lord St. Leonards' Law of Property, 367.

Limitation to the second and other sons supplied.

Under a bequest in trust for the testator's widow for her life in trust for his children, followed by powers of maintenance and advancement after the widow's death, with an ultimate gift over after her death in default of children attaining vested interests, the Court supplied the words "and after her death" after the words "for her life." *Greenwood v. Greenwood*, 5 Ch. D. 954.

So, too, where there was a limitation in a settlement to the children of the marriage who being a son or sons should attain twenty-one years; and if there should be but one such child, the whole to be in trust for such one child, his *or her* executors and administrators, and there were powers of applying the presumptive share of every such child for his *or her* maintenance until his *or her* share should become vested, the Court held daughters to be included in the gifts. *In re Daniel's Settlement Trusts*, 1 Ch. D. 375.

Limitation to daughters supplied in a marriage settlement.

So, where property was given upon trust for all the children of A. "who being a son or sons shall live to attain twenty-one years or being a daughter or daughters shall marry under that age," it was held that the gift to daughters vested on their attaining twenty-one. *Re Hunt; Davies v. Hetherington*, 62 L. T. 753.

Chap.
XLVIII.

In a somewhat similar case, where there were limitations to daughters for life with remainder to their children, and the limitation to the children of one daughter was omitted, it was supplied upon the general intention of the will. *In re Redfern*; *Redfern v. Bryning*, 6 Ch. D. 133; see *Re Smith*; *Bashford v. Chaplin*, 45 L. T. N. S. 246; *Mellor v. Daintree*, 33 Ch. D. 198.

The words
“without
issue” sup-
plied, so as
not to divest
a prior estate
tail.

So when there is a gift to A. in tail, and if he die over, the words “without issue” will be supplied in the gift over to satisfy the implied contingency. *Anon.*, 1 And. 33.

And in a similar case, where there were devises to several in tail and the interest of one of the tenants in tail was given over to another, “if he died living Alice,” the words “without issue” were supplied, there being a gift over of the whole upon death of all the tenants in tail without issue. *Spalding v. Spalding*, Cro. Car. 185.

*Abbott v.
Middleton.*

The extreme limit to which the Court will go in supplying words in such cases is probably marked by *Abbott v. Middleton*, 7 H. L. 68. The gift there was of personalty to the testator's wife for life and then to his son for life with remainder to the son's children and “in case of my son dying before his mother” over. The son died, leaving a child, and the House of Lords held (diss. Lords Cranworth and Wensleydale) that the words “without children” must be supplied in the gift over, so as to leave the child of A. in possession of the property.

However, if the testator expressly distinguishes death in the lifetime of a tenant for life from death without issue; if, for instance, the gift over is either in the event of death before the tenant in tail or in the event of death without issue at any time, the gift over must be literally construed. *Eastwood v. Lockwood*, L. R. 3 Eq. 487.

Where a testator bequeathed the remainder of his property “and any other property of which I may die possessed, and I nominate my son my executor,” it was held that the residue was undisposed of. *Driver v. Driver*, 43 L. J. Ch. 279.

UNCERTAINTY.

Chap.
XLVIII.

If it is impossible to ascertain the subject-matter or the objects of a gift, it will be void for uncertainty. See *Asten v. Asten*, (1894) 3 Ch. 260.

Thus, a gift of some of my linen, not saying how much, or of a handsome gratuity, is void. *Peck v. Halsey*, 2 P. W. 387; *Jubber v. Jubber*, 9 Sim. 503. See *Jones d. Henry v. Hancock*, 4 Dow, 145.

A bequest of indefinite amount is void.

On the other hand, if the testator supplies a measure of the bequest, the Court will ascertain how much ought to be expended; thus, a gift of a sum of money to an executor for his trouble, or even of a house or garden to be built at the expense of his executors, is good, and the Court will fix the amount. *Jackson v. Hamilton*, 3 J. & Lat. 702; *Edwards v. Jones*, 35 B. 474. See *Magistrates of Dundee v. Morris*, 3 Macq. 134.

A gift of 50*l.* or 100*l.*, or of a sum not exceeding a certain amount, will be construed in favour of the legatee as a gift of the larger sum. *Seale v. Seale*, 1 P. W. 290; *Thompson v. Thompson*, 1 Coll. 395; *Cope v. Wilmot*, 1 Coll. 396, *n.*; *Gough v. Bult*, 16 Sim. 45.

Gift of a sum not exceeding a certain amount.

Upon similar principles the gift of the rest of a fund, if the rest cannot be ascertained, is void; as in a devise of such houses as she shall select to A. and the others to B., where A. dies before the testator. *Boyce v. Boyce*, 16 Sim. 476; *Jerningham v. Herbert*, 4 Russ. 388.

Gift of the rest of a fund when the rest cannot be ascertained.

For cases in which the objects of the gift were held to be so uncertain that the gift failed, see *Buckley v. Buckley*, 19 L. R. Ir. 544; *Smithwick v. Hayden*, 19 L. R. Ir. 490.

CHAPTER XLIX.

SATISFACTION AND ADEMPMENT.

SATISFACTION.

Chap. XLIX.

Satisfaction
of portions
by legacies.

WHEN a parent or a person *in loco parentis* has covenanted to pay a portion to a child and afterwards gives a legacy of the same or a larger amount to that child, the legacy is *primâ facie* a satisfaction of the portion, and if the legacy is of smaller amount it is a satisfaction *pro tanto*. *Warren v. Warren*, 1 B. C. C. 305 ; 1 Cox, 41.

Declarations by the testator are admissible to rebut the presumption against double portions. *In re Tussaud's Estate*, 9 Ch. D. 363.

Satisfaction
arises between
a gift and a
liability to
give.

Satisfaction
and ademp-
tion dis-
tinguished.

Satisfaction only arises between a gift and a prior liability to give and not between a sum actually settled and a subsequent gift by will or otherwise. *Samuel v. Ward*, 22 B. 347.

On the other hand, when there is a gift by will to a child, and the testator afterwards in his lifetime gives the child a sum of money, the bequest is adeemed *pro tanto*.

The difference between the two cases is, that in the former case the portion which the testator has covenanted to pay can only be satisfied by the bequest with the consent of the objects of the covenant ; in the latter case the gift by will is revocable and the testator may substitute for it any form of gift he pleases.

Again, in the former case the question whether the gift by will was intended to be a satisfaction of the covenant is a question of testamentary intention ; in the latter the question is as to the effect of an act subsequent to the will, and not as to any intention manifested by the will itself.

Lastly, in cases of satisfaction, election must always arise ; in Chap. XLIX cases of ademption it never can.

It follows that the presumption that a gift by will is intended to be a satisfaction of a prior covenant to pay a portion is more easily rebutted than the similar presumption in the case of ademption.

Thus, the fact that the objects of the gift by will are not the same as the objects of the covenant, is a stronger argument against satisfaction than against ademption, as the testator cannot be supposed to have wished to do by his will what it was out of his power to do, though, on the other hand, the argument is inconclusive, since the bequest by will may be intended as a satisfaction with regard to some of the objects of the covenant, leaving such of them as take nothing under the will to their rights under the covenant. See *In re Tusseaud's Estate*, 9 Ch. D. 363.

Thus, a covenant to settle a certain share upon a son for life and then upon trusts for the benefit of his wife and children, is satisfied as regards the son by a bequest to him absolutely. *McCarogher v. Whieldon*, 3 Eq. 236 ; see *Bennett v. Houldsworth*, 6 Ch. D. 671.

Covenant to settle for life satisfied by absolute bequest.

So, too, a direct bequest to grandchildren is, as regards the grandchildren, a satisfaction of a covenant to settle a sum upon a daughter and her husband for their lives and the life of the survivor, remainder to their children as they should appoint, and in default of appointment to the children equally. *Campbell v. Campbell*, L. R. 1 Eq. 383.

Covenant to settle in remainder satisfied by immediate bequest.

The fact that legacies to the testator's widow are declared to be in lieu of her claim under the settlement will not rebut the presumption against double portions in the case of legacies to children without any such declaration. *Ackworth v. Ackworth*, cited 3 Ves. 527 ; 1 B. C. C. 307, n. ; *Moulson v. Moulson*, 1 B. C. C. 83 ; see, too, *Finch v. Finch*, 1 Ves. Jun. 534, where the legacy was expressed to be for a portion.

Legacies in lieu of claims under the settlement.

The presumption of satisfaction may be rebutted by the difference in the thing given by the will and covenanted to be settled.

Satisfaction rebutted by the difference between the subject-matter of the

a. Thus, a devise of land is no satisfaction of a covenant to
T.W.

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Chap. XLIX.

covenant and bequest.

Portion satisfied by gift of residue.

Contingent legacy and vested portion.

Differences between the covenant and the will insufficient to rebut satisfaction.

pay money, unless the lands are expressly estimated by the testator in money. *Goodfellow v. Burchett*, 2 Vern. 298; *Ben-gough v. Walker*, 15 Ves. 507; see *In re Lawes*; *Lawes v. Lawes*, 20 Ch. D. 81; *In re Vickers*; *Vickers v. Vickers*, 37 Ch. D. 525.

But the fact that the gift by will is of a share of residue will not prevent the gift being a satisfaction of a portion. *Lady Thynne v. Earl of Glengall*, 2 H. L. 131.

b. A contingent legacy is no satisfaction of a vested portion. *Bellasis v. Uthwait*, 1 Atk. 426; *Hanbury v. Hanbury*, 2 B. C. C. 352; *Pierce v. Locke*, 3 Ir. Ch. 205, 215.

The presumption of satisfaction will not be rebutted by slight differences between the covenant and the will; as, for instance, differences in the mode of payment, the covenant being to pay on the widow's death, the will within three months of her death. *Sparkes v. Cator*, 3 Ves. 530; *Copley v. Copley*, 1 P. W. 146; see *Bethell v. Abraham*, 22 W. R. 745; *In re Battersby's Estate*, 19 L. R. Ir. 359.

Or by the fact that the covenant contains a provision for children dying before their portions are payable and the will does not. *Hinchcliffe v. Hinchcliffe*, 3 Ves. 516.

Or that the settlement gives a power to the husband and wife jointly, while the will gives it to the wife alone. *Lady Thynne v. Earl of Glengall*, 2 H. L. 131; *Russell v. St. Aubyn*, 2 Ch. D. 398; *Romaine v. Onslow*, 24 W. R. 899.

Or that the settlement is upon children of the daughter by a particular marriage, whereas the gift by will is to all the children. *Lady Thynne v. Earl of Glengall*, 2 H. L. 131; *Russell v. St. Aubyn*, 2 Ch. D. 398.

A restraint upon anticipation will not rebut satisfaction, nor will the fact that the will gives a remainder to children in fee, the covenant being to them in tail. *Weall v. Rice*, 2 R. & M. 251.

Nor will the fact that the gift by will gives the wife the first life estate, whereas the covenant gives it to the husband. *Russell v. St. Aubyn*, 2 Ch. D. 398; *Romaine v. Onslow*, 24 W. R. 899.

Nor the fact that the life estate given to the husband by the

will is determinable on bankruptcy or alienation, there being no such liability to determine in the covenant. *Russell v. St. Aubyn*, 2 Ch. D. 398. Chap. XLIX.

The omission from the will of a life interest to the husband, who took the second life interest under the covenant, has been held not to rebut the presumption of satisfaction. *Mayd v. Field*, 3 Ch. D. 587.

But a legacy to a daughter for life for her separate use and after her decease, in case her husband should be living, for such persons exclusive of her husband as she should appoint, and in case he should die in her lifetime to her appointees, is not a satisfaction of a covenant to settle on trust to pay a part to the daughter for pin-money and the rest to the husband for life, and if the daughter survive him to her for life, remainder to the children of the marriage as she shall appoint. *Lord Chichester v. Coventry*, L. R. 2 H. L. 71; see *Lewis v. Lewis*, L. R. 11 Eq. 110, 340.

What amount of difference is sufficient to rebut satisfaction.

Nor is a legacy to a daughter for life to her separate use without power of anticipation with remainder to her children, a satisfaction of a covenant to settle upon such trusts as the daughter should with the consent of trustees appoint, and subject thereto for the daughter and her husband successively for life, remainder for the children and in default of children for the husband absolutely. *In re Tussaud's Estate*, 9 Ch. D. 363.

It seems that a direction in the will to pay debts, or debts and legacies, would not alone rebut the presumption of satisfaction, though great stress has been laid upon it, and, coupled with other circumstances, it will have that effect. *Lord Chichester v. Coventry*, L. R. 2 H. L. 71; *Paget v. Grenfell*, 6 Eq. 7; *Bennett v. Houldsworth*, 6 Ch. D. 671. Direction to pay debts.

And where a testator charged his real estates with an annuity to his second son and by will, after making legacies to the second son far exceeding the value of the annuity, devised the estates in strict settlement "subject to the charges and incumbrances thereon," it was held that the presumption of satisfaction was not rebutted, although at the testator's death the estates were subject to one mortgage

Chap. XLIX.

Covenant in
the nature of
a debt.

only in addition to the annuity. *Montagu v. Earl of Sandwich*, 32 Ch. D. 525.

Again, when the portion covenanted to be paid is in the nature of a debt due to the husband or the trustees of the settlement, the presumption of satisfaction is more easily rebutted.

Thus, in *Hall v. Hill*, 1 D. & War. 94, a legacy to the daughter was held to be no satisfaction of a bond to the husband on the marriage of the daughter. See, too, *Lord Chichester v. Coventry*, *supra*.

SATISFACTION IN THE CASE OF STRANGERS.

Express
declaration
that legacies
are to be in
satisfaction.

In the case of gifts by strangers, there is no presumption against double portions, and a question of satisfaction can only arise upon the express declaration of the donor, that subsequent gifts by him are to go in satisfaction of what he has given by the instrument containing the declaration.

Whether
provision by
will is an
advancement
in the testa-
tor's lifetime.

In such cases the question has arisen whether a provision by will is to be considered an advancement in the lifetime of the testator.

There can be no doubt that, where there is a declaration that gifts made by a father "in his lifetime or by his will," or "in his life or at his death," are to go in satisfaction, provision by will would be included in these words. *Papillon v. Papillon*, 11 Sim. 642; *Rickman v. Morgan*, 1 B. C. C. 63; 2 B. C. C. 393.

But there is no such rule as that supposed to have been laid down by Lord Eldon in *Leake v. Leake*, 10 Ves. 476, p. 488, that a provision by will is to be considered as an advancement in the lifetime of the party. Whether it is or is not depends on the language of the declaration.

Thus, a declaration that if the father should during his life advance or pay any sums for the benefit of his children, the sums so advanced should be taken *pro tanto* in satisfaction of the portions of his children, will not include gifts by will. *Cooper v. Cooper*, 8 Ch. 813; see *Douglas v. Willes*, 7 Ha. 318.

Though, on the other hand, the words may be large enough

to include provision by will ; where, for instance, the proviso is, if the father should have bestowed or given portions to his children on their marriage, " or otherwise provided for them." *Leake v. Leake*, 10 Ves. 477. Chap. XLIX.

And the words " settle, give, or advance " have been held to include provision by will. *Onslow v. Michell*, 18 Ves. 490 ; see, too, *Golding v. Haverfield*, 13 Pr. 593 ; M'Cl. 345 ; *Fazakerley v. Gellibrand*, 6 Sim. 591 ; but the authority of these cases must be looked upon as doubtful since *Cooper v. Cooper*.

A devise of lands is not within a proviso that sums of money advanced are to be taken in satisfaction, nor is a gift to the trustees of the marriage settlement of the donee, and not the donee personally. See Lord Romilly's judgment, *Cooper v. Cooper*, 6 Ch. 820, *n*.

Where sums advanced are directed to be taken in satisfaction, unless the contrary is directed in writing by the person making the advance, the declaration to the contrary need not be express, but may be gathered from the general terms of the instrument by which the advance is made. *Leake v. Leake*, cited 18 Ves. 494 ; *Fazakerley v. Gellibrand*, 6 Sim. 591. Declaration that advances are to be in satisfaction, unless the contrary is directed in writing.

SATISFACTION OF DEBTS.

The doctrine of satisfaction also applies to a legacy to a creditor. In such a case the legacy, if of equal or greater amount, is *prima facie* considered a satisfaction of the debt. *Talbot v. Shrewsbury*, Prec. Ch. 394 ; *Fowler v. Fowler*, 3 P. W. 353. Legacy of equal or greater amount is a satisfaction of a debt.

The general rule has, however, been so often disapproved of, and has been held to be excluded by such slight indications of intention, that it is of small practical importance.

1. As to what debts may be satisfied by legacies :—

a. The debt to be satisfied must be a debt existing at the date of the will. *Cranmer's Case*, 2 Salk. 508 ; *Thomas v. Bennett*, 2 P. W. 343 ; *Plunkett v. Lewis*, 3 Ha. 330. The debt must exist at the date of the will.

It is immaterial that the testator afterwards pays the debt. *In re Fletcher* ; *Gillings v. Fletcher*, 38 Ch. D. 373.

b. The testator must have been certain at the date of the The debt

Chap. XLIX.

must be
certain.

will that a debt was due and to whom it was due, and therefore a mere liability on a current account, or on a negotiable instrument, such as a bill of exchange, will not be satisfied by a legacy. *Rawlins v. Powell*, 1 P. W. 297; *Carr v. Eastabrooke*, 3 Ves. 561; *Buckley v. Buckley*, 19 L. R. Ir. 544.

But the fact that the debt is liable to decrease makes no difference. *Edmunds v. Low*, 3 K. & J. 318.

2. As to what legacies will not be considered to satisfy debts:—

Legacy of
smaller
amount is no
satisfaction
of a debt.

a. A legacy of smaller amount is no satisfaction of a debt. *Cranmer's Case*, 2 Salk. 508; *Atkinson v. Webb*, 2 Vern. 478; *Eastwood v. Vinke*, 2 P. W. 614; *Gee v. Liddell*, 35 B. 621; see *Richardson v. Elphinstone*, 2 Ves. Jun. 463; *Reade v. Reade*, 9 L. R. Ir. 409.

Gift of
residue,

b. Nor is a gift of residue. *Barrett v. Beckford*, 1 Ves. Sen. 519; *In re Keogh's Estate*, 23 L. R. Ir. 257.

of a contin-
gent legacy.

c. Nor is a gift of a contingent legacy. *Tolson v. Collins*, 4 Ves. 482; *Mathews v. Mathews*, 2 Ves. Sen. 635.

3. Satisfaction is also rebutted by the difference in the nature of the legacy and the debt.

Debt by bond
is not satisfied
by a devise
of land.

a. As where the debt is by bond and the testator devises land. *Eastwood v. Vinke*, 2 P. W. 614; *Richardson v. Elphinstone*, 2 Ves. Jun. 463.

Debt not
satisfied when
the legacy
is less advan-
tageous.

b. If the legacy is less advantageous than the debt; if, for instance, the legacy is payable in six months, the debt in one: *Haynes v. Mico*, 1 B. C. C. 129; *Deveze v. Pontet*, 1 Cox, 188; *Adams v. Lavender*, M'Cl. & Y. 41; or the legacy is payable half-yearly, the debt quarterly: *Atkinson v. Webb*, Prec. Ch. 236; if the debt is secured, the legacy not: *Wood v. Wood*, 7 B. 183; or the debt is a first charge, the legacy not: *Hales v. Darell*, 3 B. 325; if the debt is to the separate use, the legacy not. *Bartlett v. Gillard*, 3 Russ. 149; *Rowe v. Rowe*, 2 De G. & S. 294; *Fourdrin v. Gowdey*, 3 M. & K. 409; but see *Atkinson v. Littlewood*, 18 Eq. 595.

And an annuity given by will, and therefore not payable till a year after the testator's death, is not a satisfaction of a covenant to pay an annuity by half-yearly payments. *In re Dowse*; *Dowse v. Glass*, 50 L. J. Ch. 285; see *In re Horlock*; *Calham v. Smith*, W. N., (1895) 36.

c. Sums held on trust for a tenant for life are not satisfied by legacies of those amounts to the tenants for life absolutely. *Fairer v. Park*, 3 Ch. D. 309. Chap. XLIX.

d. If the legacy is expressed to be given in satisfaction of dower. *Pinchin v. Simms*, 30 B. 119; *Glover v. Hartcup*, 34 B. 74. Legacy in lieu of dower.

e. The fact that the debt is due to one set of trustees, and the legacy is given to another, is a circumstance to be considered, but apparently not alone decisive. *Pinchin v. Simms*, 30 B. 119; *Smith v. Smith*, 3 Giff. 121; and see *Atkinson v. Littlewood*, 18 Eq. 595. Debt due to one set of trustees, legacy to another.

4. The presumption will be rebutted by a direction to pay "debts and legacies." *Chancey's Case*, 1 P. W. 408; *Lethbridge v. Thurlow*, 15 B. 334; *Richardson v. Greese*, 3 Atk. 65; *Field v. Mostin*, 2 Dick. 543; *Jefferies v. Michell*, 20 B. 15; *Hassell v. Hawkins*, 2 Dr. 469. Direction to pay debts and legacies.

But not if the direction is in the will, and a debtor, whose debt is incurred subsequent to the will, receives a legacy by a codicil. *Gaynon v. Wood*, 1 P. W. 409, n.

Whether a debt payable within three months of the testator's decease would be within the direction to pay debts seems doubtful. In *Wathen v. Smith*, 4 Mad. 325, it was held not; on the other hand, Lord Romilly, in *Cole v. Willard*, 25 B. 568, disapproved of this decision. See, too, *Atkinson v. Littlewood*, 18 Eq. 595.

5. A direction to pay "debts" only rebuts the presumption of satisfaction. *Horlock v. Wiggins*; *Wiggins v. Horlock*, 39 Ch. D. 142; *In re Huish*; *Bradshaw v. Huish*, 43 Ch. D. 260, not following *Edmunds v. Low*, 3 K. & J. 318. Direction to pay debts.

6. Where the document creating the debt and the will are nearly contemporaneous, the presumption of satisfaction is much more easily rebutted. *Horlock v. Wiggins*; *Wiggins v. Horlock*, 39 Ch. D. 142. Debt and will contemporaneous.

ADEMPMENT.

As ademption arises from acts subsequent to the will, there can be no expression of intention contained in the will as to whether a subsequent gift was meant to be an ademption or

Chap. XLIX

Ademption
of legacies by
advances.

not; the question is, therefore, not properly within the limits of the present treatise. For the sake of convenience, however, it may be useful to notice a few of the more important points arising with reference to this subject.

I. A bequest to a child or person to whom the testator has placed himself *in loco parentis* is adeemed by a subsequent gift to the legatee in the testator's lifetime, unless the nature of the two gifts is so different as to rebut the presumption. *Leighton v. Leighton*, 18 Eq. 459; see *Boyd v. Boyd*, 4 Eq. 305; *Taylor v. Taylor*, 20 Eq. 155; *In re Lacon*; *Lacon v. Lacon*, (1891) 2 Ch. 482.

A gift of less amount than the legacy is an ademption *pro tanto*. *Pym v. Lockyer*, 5 M. & C. 29.

For the purposes of ademption the value of the advance is to be taken as at the time it was made. *Watson v. Watson*, 33 B. 576.

For the mode of valuing annuities, see *Hatfield v. Minet*, 8 Ch. D. 136.

Ademption
in the case of
a residue.

Ademption applies as well to a gift of residue as to general legacies, though in the case of residue it will be applied only between children against a child in favour of a child, and not in favour of a stranger. *Montefiore v. Guedalla*, 1 D. F. & J. 93; *Meinertzen v. Walters*, 7 Ch. 670.

Differences in the time of payment of the legacy and the portion are immaterial. *Hartopp v. Hartopp*, 17 Ves. 184; *Stevenson v. Masson*, 17 Eq. 84.

Small
advances for
a particular
purpose will
not adeem a
legacy.

Advances, however, for some particular purpose, as to buy a wedding outfit or small occasional presents, or even a small annual allowance, will not adeem legacies by will. *Ravenscroft v. Jones*, 32 B. 669; *Watson v. Watson*, 33 B. 574; *Schofield v. Heap*, 27 B. 93; see *Hatfield v. Minet*, 8 Ch. D. 136.

As in the case of satisfaction the presumption of ademption may be repelled by the difference in the subject-matter of the two gifts.

Vested legacy
and contin-
gent advance.

There will be no ademption if the legacy is certain and the gift is contingent. *Spinks v. Robins*, 2 Atk. 493; *Crompton v. Sale*, 2 P. W. 553.

But a legacy of residue may be adeemed by the gift of a share in a business. *In re Vickers*; *Vickers v. Vickers*, 37 Ch. D. 525; *In re Lawes*; *Lawes v. Lawes*, 20 Ch. D. 81; not following *Holmes v. Holmes*, 1 B. C. C. 555.

Chap. XLIX.

Legacy of residue adeemed by gift of share in business.

And the presumption is not rebutted by the fact that some benefits are given to the testator by the transaction relied on as an ademption. *In re Vickers*, *supra*.

But the presumption may be rebutted if the gift to the child is partly intended as remuneration for past or future services. *In re Lacon*; *Lacon v. Lacon*, (1891) 2 Ch. 482.

A bequest of a sum of money to a child absolutely is adeemed by the subsequent settlement of that or a larger amount on the marriage of the child; if a smaller amount is settled, it is an ademption *pro tanto*. *Lord Durham v. Wharton*, 3 Cl. & F. 146; *Stevenson v. Masson*, 17 Eq. 78; *Edgeworth v. Johnston*, I. R. 11 Eq. 326.

A legacy is adeemed by a subsequent settlement.

And even if the legacy be given to the child for life with remainder to her children, a subsequent gift to her absolutely is an ademption. *Kirk v. Eddowes*, 3 Ha. 509.

But where there is a substitutional gift to the issue of a child dying in the testator's lifetime, a subsequent advancement to a child who dies in the testator's lifetime leaving issue will not operate as an ademption of the gift to the issue. *Rose v. Rogers*, 39 L. J. Ch. 791; *Hewitt v. Jardine*, 14 Eq. 58.

Advance to a child will not adeem a substitutional bequest to his issue.

And a sum given to a daughter's husband in consideration of his making a settlement upon her, or for the purposes of the marriage, is an ademption of a legacy to the daughter. *Lord Durham v. Wharton*, 3 Cl. & F. 146; see *Nevin v. Drysdale*, 4 Eq. 517.

Gift to the husband for the purposes of the marriage adeems a legacy to the daughter.

But a gift to the husband absolutely, though expressed to be a portion for a daughter, is not an ademption of a legacy to the daughter and her children. *Ravenscroft v. Jones*, 32 B. 669; *Cooper v. Macdonald*, 16 Eq. 258; see *McClure v. Evans*, 6 W. R. 428.

The fact that the legacy to the child is given over in certain events will not prevent a subsequent gift to the child absolutely, or a settlement upon her marriage from adeeming the legacy, both as regards the child and the persons interested under the

An absolute gift may adeem a legacy given with executory gifts over.

Chap. XLIX.

An adeemed legacy is not revived by a codicil.

Advances made before the date of the will.

Legacies given for a purpose are adeemed if the testator satisfies the purpose.

Directions as to advances.

Advances recited to have been made.

Entries subsequent to date of will.

gift over. *Twining v. Powell*, 2 Coll. 262; *Dawson v. Dawson*, 4 Eq. 504; *Cooper v. Macdonald*, 16 Eq. 258.

An adeemed legacy is not revived by a codicil republishing the will. *Powys v. Mansfield*, 3 M. & Cr. 376; see *Ravenscroft v. Jones*, 4 D. J. & S. 228.

An advance made before the date of the will will not operate as an ademption in the absence of a special agreement that it shall. *Upton v. Prince*, Ca. t. Talb. 71; *In re Peacock's Estate*, 14 Eq. 236; *Taylor v. Cartwright*, 41 L. J. Ch. 529.

Where a legacy is given for a particular purpose or in satisfaction of a moral obligation, whether to a stranger or not, and the testator afterwards in his lifetime satisfies the purpose or obligation, the legacy is adeemed. *Debeze v. Mann*, 2 B. C. C. 519; *Monck v. Monck*, 1 Ba. & Be. 298; *Powys v. Mansfield*, 3 M. & Cr. 359; *In re Pollock*; *Pollock v. Worrall*, 28 Ch. D. 552; *Griffith v. Bourke*; *Bourke v. Griffith*, 21 L. R. Ir. 92.

But it must appear on the face of the will that the legacy is for a particular purpose. *Pankhurst v. Howell*, 6 Ch. 136; see *In re Fletcher*; *Gillings v. Fletcher*, 38 Ch. D. 373.

II. In some cases the will contains directions that advances are to be deducted from the shares of legatees.

Where the testator recited that he had paid £5,000 for his son-in-law, and directed that if the son-in-law should not before the testator's death have repaid £5,000 at least, that sum should be taken in part payment of a legacy to the son-in-law, and £5,000 had not in fact been paid for the son-in-law, it was held that the legacy was to be reduced only by the amount actually paid. *In re Taylor's Estate*; *Tomlin v. Underhay*, 22 Ch. D. 495.

In other cases legatees have been held bound by recitals as to the amount of advances and by entries in ledgers referred to by the testator. *In re Aird's Estate*; *Aird v. Quick*, 12 Ch. D. 291; *Quihampton v. Going*, 24 W. R. 917; *In re Wood*; *Ward v. Wood*, 32 Ch. D. 517; see *Burrowes v. Lord Clonbrock*, 27 L. R. Ir. 538.

But entries made subsequent to the date of the will cannot be incorporated into it, and made binding on the legatee, though they are admissible as evidence that advances were made by the

testator. *Smith v. Conder*, 9 Ch. D. 170; *Whateley v. Spooner*, Chap. XLIX, 3 K. & J. 542; see *Re Coyte*; *Coyte v. Coyte*, 56 L. T. 510.

Where advances are directed to be brought into account evidence is not admissible to show that the testator, some time after an advance, had written off a portion of the advance as a gift. *Smith v. Conder*, 9 Ch. D. 170.

Where a testator directed advances appearing in a specified book to be taken into account, and subsequently destroyed the book, it was held that no advances, whether made before or after the will, were to be taken into account. *Re Coyte, supra*.

A direction to deduct advances from shares of residue does not affect a residuary legatee's right to a general legacy given him by the will. *Smith v. Crabtree*, 6 Ch. D. 591.

A sum not payable to the testator till after his death is not within a direction to bring advances into hotchpot. *Auster v. Powell*, 1 D. J. & S. 99; *In re Whitehouse*; *Whitehouse v. Edwards*, 37 Ch. D. 683.

Sum due after testator's death.

If the legatee has become bankrupt and the testator proved in the bankruptcy for a debt due from him, so much of the debt as remains unpaid must be brought into account. *Auster v. Powell*, 1 D. J. & S. 99; see *Silverside v. Silverside*, 25 B. 340.

Legatee bankrupt.

Where the income of a legatee was directed to be made up to a certain amount, the legatee to certify her income from all sources, it was held that the legatee was not bound to bring into account an annuity given by a subsequent testator with a direction that it was not to be taken into account, but was to be a clear beneficial addition. *In re Hedge's Trust Estate*, 18 Eq. 419.

A direction to deduct a sum from the share of a legatee as an equivalent for an estate given to him fails if the estate is not purchased. *Nugee v. Chapman*, 29 B. 288.

Under a direction to deduct advances made to a legatee by her brothers or sisters, debts owing from the legatee to her brothers and sisters may be deducted though barred by the statute. *Poole v. Poole*, 7 Ch. 17.

Where the testator directed his sons to pay or account for debts owing to him before they should receive their shares, and the share of a son was settled by a codicil, it was held that a

Chap. XLIX.

debt due from the son was to be brought into account for the purpose of division, but not for the purpose of increasing the amount to be settled. *White v. Turner*, 25 B. 505.

When hotch-
pot clause
ceases to
operate.

Where the residue was given to the testator's children by a first and second wife to vest at twenty-one, with a direction that if the children by the first wife should become entitled to another fund they should bring it into hotchpot, it was held that the hotchpot clause ceased to operate when the eldest child attained twenty-one. *Stares v. Penton*, 4 Eq. 40.

Lapsed share.

Where the testator directed his children, who were his residuary legatees, to bring advances into hotchpot, and a share given to one of the children was revoked and lapsed, it was held that the hotchpot clause applied to the lapsed share, and that the son, whose share was revoked, could not claim as next of kin, without bringing advances into hotchpot, but not so as to increase the widow's share. *Stewart v. Stewart*, 15 Ch. D. 539.

Interest on
advances.

In the case of direct gifts where advances made by the testator are directed to be deducted from a legatee's share, interest at 4 per cent. on such advances must be computed from the testator's death. *Andrewes v. George*, 3 Sim. 393; *Hilton v. Hilton*, 14 Eq. 468; *Field v. Seward*, 5 Ch. D. 538; see *Poole v. Poole*, 7 Ch. 17.

If the testator directs the advances to be deducted with interest at 5 per cent., interest at that rate will be computed down to the testator's death and at 4 per cent. from that date. *Stewart v. Stewart*, 15 Ch. D. 539.

In the case of gifts in remainder interest must be computed from the death of the tenant for life. *In re Rees*; *Rees v. George*, 17 Ch. D. 701; but see *Limpus v. Arnold*, 13 Q. B. D. 246; 15 Q. B. D. 300.

As between the tenant for life and an advanced child whose advance with interest is directed to be taken in full or part satisfaction of his share, it has been held that the child is bound to pay the tenant for life interest on the advance. *Limpus v. Arnold*, 13 Q. B. D. 246; 15 Q. B. D. 300.

Under the ordinary hotchpot clause life and reversionary interests must be brought into account. *Eales v. Drake*, 1 Ch. D. 217.

In the case of appointments under powers hotchpot clauses **Chap. XLIX.**
will not be implied.

Thus, an appointment in favour of an object "as and for her share" does not exclude that object from sharing in the unappointed part, though the sum left unappointed is such as would give all the objects equal shares. *Wilson v. Piggott*, 2 Ves. Jun. 351; *Wombwell v. Hanrott*, 14 B. 143; *Walmsley v. Vaughan*, 1 De G. & J. 114.

Appointment
"as and for
her share."

And it seems a direction that the appointed share is in lieu of all claims and demands of the donee to or for her original share in the trust fund will not exclude her from the unappointed part. *Foster v. Cautley*, 6 D. M. & G. 55.

Share in lieu
of claims.

On the other hand, an appointment to one object, coupled with a declaration that the donee of the power wishes the fund equally divided, may amount to an appointment of the rest of the fund to the other objects. *Fortescue v. Gregor*, 5 Ves. 553.

And a direction for accruer which can only have a meaning on the supposition that the fund has been appointed in favour of other objects, may also amount to an appointment. *Foster v. Cautley*, 6 D. M. & G. 55.

In the case of a deed, if the appointee is a party and a share is appointed to him in lieu of his share in the fund, the appointee cannot share in the unappointed part. *Clune v. Apjohn*, 17 Ir. Ch. 25; *Armstrong v. Lynn*, 1 R. 9 Eq. 186.

Under a gift to several persons as A. shall appoint with a gift in default of appointment to them equally, a direction to bring advances into hotchpot applies only to the unappointed portion of the fund. *Brocklehurst v. Flint*, 16 B. 100.

CHAPTER L.

INTERESTS UNDISPOSED OF.

LAPSE.

<u>Chap. L.</u>	PORTIONS of a testator's property may be undisposed of, either because the disposition attempted by him has failed, or because no disposition has been attempted.
Doctrine of lapse.	A devise or legacy, whether it be of a debt due to the testator or not, lapses by the death of the devisee or legatee before the testator, or even before the date of the will. <i>Elliott v. Davenport</i> , 1 P. W. 83 ; 2 Vern. 581 ; <i>Maybank v. Brooks</i> , 1 B. C. C. 84.
Confirmation by codicil.	Confirmation by codicil of a will containing a legacy to a legatee, her executors and administrators, where the legatee has died since the date of the will, does not prevent a lapse or give the legacy to the executors of the legatee. <i>Hutcheson v. Hammond</i> , 3 B. C. C. 127 ; <i>Maybank v. Brooks</i> , 1 B. C. C. 84.
Gift to tenants in common by name.	Where the gift is to several named persons as tenants in common, the shares of any who die before the testator lapse. <i>Page v. Page</i> , 2 P. W. 489 ; <i>Peat v. Chapman</i> , 1 Ves. Sen. 542.
Person dead at date of will.	Possibly, if one of the named persons is shown on the face of the will to be dead at the date of the will, the fund would be divisible among the others. <i>Clarke v. Clemmans</i> , 36 L. J. Ch. 171.
Power of appointment.	So a devise by A. to the uses of B.'s will can only take effect in favour of those devisees of B. who survive A. <i>Culsha v. Cheese</i> , 7 Ha. 245. The doctrine of lapse applies to a power of appointment exercised by will, and the appointee must survive the donee of the power in order to take. <i>Duke of Marlborough v. Lord</i>

Godolphin, 2 Ves. Sen. 61; *Freeland v. Pearson*, L. R. 3 Eq. 658; *In re Susanni's Trusts*, 47 L. J. Ch. 65.

An appointment by will in accordance with a covenant is subject to the ordinary rule as to lapse. *Re Brookman's Trust*, 5 Ch. 182; see *Jervis v. Wolferstan*, 18 Eq. 18.

If a testator appoints under a power sums exceeding the amount of the fund and one of the appointees pre-deceases him, the other appointees are entitled to the benefit of the lapse. *Eales v. Drake*, 1 Ch. D. 217.

Appointment
in excess of
fund.

Where a testator by his will creates a power to appoint to a class, it has been said that the death of any member of the class in the testator's lifetime destroys the power *pro tanto*. See *Reade v. Reade*, 5 Ves. 744.

But the death of any members of the class after the testator's death in the lifetime of the donee of the power does not affect the power, which may be exercised as to the whole in favour of the survivors. There is no distinction for this purpose between a power to appoint to a class and a power to appoint to named individuals, with a gift to them *nominatim* in default of appointment. *Boyle v. Bishop of Peterborough*, 1 Ves. Jun. 299; *Ricketts v. Loftus*, 4 Y. & C. Ex. 519; *Paske v. Haselfoot*, 33 B. 125; *In re Ware*; *Cumberlege v. Cumberlege-Ware*, 45 Ch. D. 269.

A gift to a debtor of his debt, though the debt be given to him, his executors and administrators, with a direction to hand over the securities to him, is in effect a legacy, and lapses by the death of the debtor in the testator's lifetime. It is immaterial whether the debt is given or forgiven. *Toplis v. Baker*, 2 Cox, 118; *Elliott v. Davenport*, 1 P. W. 83; 2 Vern. 521; *Maitland v. Adair*, 3 Ves. 231; *Izon v. Butler*, 2 Pr. 34.

Gift to
debtor.

Possibly, a general direction to hand over the security to be cancelled might release the debt, whether the debtor survives the testator or not. *Sibthorp v. Moxom*, 3 Atk. 580; 1 Ves. Sen. 49; see *South v. Williams*, 12 Sim. 566.

With regard to legacies to creditors of the testator in discharge of debts which have been released by the operation of the bankruptcy laws or by lapse of time :—

Legacies
to creditors
whose debts
are barred.

Chap. L.

1. A gift to the official assignee in bankruptcy in trust to pay debts will not fail as regards creditors who die in the testator's lifetime, though the debts are barred by the Statute of Limitations as well as discharged by a certificate in bankruptcy. *In re Sowerby's Trusts*, 2 K. & J. 630; 7 D. M. & G. 429; *Turner v. Martin*, 5 W. R. 277; 3 Jur. N. S. 397.

2. Nor will the gift of a sum to be divided among creditors, though the debts may be barred by the Statute of Limitations, if they have not been released by the creditors. *Williamson v. Naylor*, 3 Y. & C. Ex. 208; *Phillips v. Phillips*, 3 Ha. 281.

3. On the other hand, if the gift is not through the medium of the assignee and the debts have been released or extinguished, the gift is mere bounty, and will fail as regards the creditors dying in the testator's lifetime: *Coppin v. Coppin*, 2 P. W. 295; but the authority of this case is very doubtful. And see *Golds v. Greenfield*, 2 Sm. & G. 476.

Effect of a
declaration
against lapse.

A declaration that a legacy shall not lapse is not sufficient to prevent lapse, unless it is clear that it is to go to the estate of the legatee in the event of his death. *Pickering v. Stamford*, 3 Ves. 493; *Johnson v. Johnson*, 4 B. 318; *Underwood v. Wing*, 4 D. M. & G. 633; see *Wilder's Trusts*, 27 B. 418.

But a gift to A. and his executors or administrators with a direction that the legacy is not to lapse has been held sufficient. *Sibley v. Cook*, 2 Atk. 572.

On the other hand, in the case of a gift in similar terms, a direction that the legacy was to vest from the date of the will was held insufficient to prevent lapse. *Browne v. Hope*, 14 Eq. 343.

Where a testator gave his residue to A. and B. and in case of their decease to their executors, and A. predeceased the testator, having given her residue to him, it was held that the moiety given to A. lapsed. *In re Valdez's Trusts*, 40 Ch. D. 159.

Interests of
persons to
take in
default of
appointment.

The interest of persons taking in default of appointment does not fail by the death of the donee of the power before the testator. *Hardwick v. Thurston*, 4 Russ. 380; *Edwards v. Saloway*, 2 Ph. 625; *Nichols v. Haviland*, 1 K. & J. 504; *Kellett v. Kellett*, 1 R. 5 Eq. 298.

The interests of those taking in remainder do not fail by the death of the tenant for life, though they may be his next of kin, unless the subsequent limitations are only a settlement of the shares to which the legatees actually become entitled. Cases *supra*, and *Mayer v. Townshend*, 3 B. 433; *In re Speakman*; *Unsworth v. Speakman*, 4 Ch. D. 620; *Stewart v. Jones*, 3 De G. & J. 532; *In re Roberts*; *Tarleton v. Bruton*, 27 Ch. D. 346; 30 Ch. D. 234; *In re Pinhorn*; *Moreton v. Hughes*, (1894) 2 Ch. 276; perhaps *Baker v. Hanbury*, 3 Russ. 340.

Chap. I.

Interests of persons in remainder not affected by lapse of the life interest.

It is clear that a gift to A. or his executors for the benefit of his estate after a life interest, or where the payment is postponed, will fail by the death of A. before the testator: *Bone v. Cook*, M'Clel. 168; 13 Pr. 332; *Corbyn v. French*, 4 Ves. 418; *Tidwell v. Ariel*, 3 Mad. 403, where heirs was read as executors and administrators. *Leach v. Leach*, 35 B. 185.

Whether a gift to A. or his executors will lapse.

This rule, however, does not apply where the gift is to A. or his heirs after a life interest, where heirs means next of kin, who takes beneficially and not as mere representatives. *In re Porter's Trusts*, 4 K. & J. 188.

But it would seem a direct gift to A. or his executors, if executors is construed in its literal sense, would not lapse by A.'s death before the testator. See *Maxwell v. Maxwell*, I. R. 2 Eq. 478; see, however, *Aspinall v. Duckworth*, 35 B. 307; and *ante*, p. 292.

If there is a gift to A. charged with a sum payable to B., the legacy to B. does not lapse by the death of A. before the testator. *Wigg v. Wigg*, 1 Atk. 382; *Hills v. Wirley*, 2 Atk. 605; *Oke v. Heath*, 1 Ves. Sen. 134.

Charges will not fail by the death of the devisee subject to the charge.

But the legacy would fail if the gift to A. is adeemed or revoked. *Cowper v. Mantell*, 22 B. 223.

And where land was devised to a creditor on condition that he should release his debt, and the testator declared that the debt should not be paid out of residue, the debt was held charged on the land, though the creditor predeceased the testator. *In re Kirk*; *Kirk v. Kirk*, 21 Ch. D. 431.

Now, by sect. 32 of the Wills Act, a devise of an estate tail will not lapse if there are at the death of the testator any issue inheritable under the entail.

Effect of sections 32 and 33 of the Wills Act on

Chap. L.
the doctrine
of lapse.

And, by sect. 33, a gift of real or personal property to a child, or other issue of the testator, will not lapse if any issue of the devisee or legatee survive the testator.

The section applies to a gift to a child dead at the date of the will. *Wisden v. Wisden*, 2 Sm. & G. 396.

The issue surviving the testator need not be living at the death of the devisee or legatee. *In bonis Parker*, 1 Sw. & Tr. 523.

In such a case the property bequeathed belongs to the legatee as if he had survived the testator, and passes by his will *Johnson v. Johnson*, 3 Ha. 157; *In bonis Parker*, 1 Sw. & Tr. 523; *Re Mason's Will*, 34 B. 494.

If the devisee dies intestate her husband is entitled to an estate by the curtesy. *Eager v. Furnivall*, 17 Ch. D. 115.

If the legatee devises to the testator there is a lapse and the heir at law and next of kin of the legatee are entitled. *In re Hensler*; *Jones v. Hensler*, 19 Ch. D. 612.

Covenant
to settle.

Property preserved from lapse by this section is not within a covenant to settle property coming to the legatee during coverture. *Pearce v. Graham*, 11 W. R. 415; 32 L. J. Ch. 359.

Where the testator directed a daughter's share to be settled if she survived him, and she predeceased him leaving issue, it was held that the direction to settle applied to her share. *In re Hone's Trusts*, 22 Ch. D. 663.

Section 33 applies to gifts under general powers of appointment, though there is a gift over in default of appointment. *Eccles v. Cheyne*, 2 K. & J. 676.

It does not apply to special powers, nor to cases where before the Act there would have been no lapse; as, for instance, gifts to a class. *Griffiths v. Gale*, 12 Sim. 354; *Freeland v. Pearson*, L. R. 3 Eq. 658; *Olney v. Bates*, 3 Dr. 319; *Browne v. Hammond*, Johns. 210; *Holyland v. Lewin*, 26 Ch. D. 266; *In re Sir E. Harvey's Estate*; *Harvey v. Gillow*, (1893) 1 Ch. 567.

These sections apply to the interest of a person dying before the date of the will, but after the Act came into operation, but not to a person dying before the Act came into operation.

Winter v. Winter, 5 Ha. 306 ; *Mower v. Orr*, 7 Ha. 473 ; *Wild v. Reynolds*, 5 N. of C. 1.

In the case of gifts to a class as tenants in common, the shares of members of the class dying before the testator do not lapse but go to the other members of the class.

Doctrine of lapse in the case of gifts to a class.

A direction to settle the share to which any member of a class *shall become* entitled will not have the effect of preventing the shares of members dying before the testator from going to the other members. *Stewart v. Jones*, 3 De G. & J. 532.

Direction to settle.

A distinction has been drawn between such a direction and a direction to settle a daughter's "share" simply ; and it has been held that in the latter case the legacy does not lapse by the death of the daughter before the testator. *In re Speakman ; Unsworth v. Speakman*, 4 Ch. D. 620 ; this case was, however, disapproved and not followed in *In re Roberts ; Tarleton v. Bruton*, 27 Ch. D. 346 ; 30 Ch. D. 234 ; but the same distinction was recognized in *In re Pinhorne ; Moreton v. Hughes*, (1894) 2 Ch. 276.

In the same way a gift to the children of A. as tenants in common, to be vested at twenty-one, is in effect a gift to the children who attain twenty-one. *Re Colley's Trusts*, L. R. 1 Eq. 496.

A direction that the shares of any members of the class who die before the testator, leaving issue, shall not lapse, will not have the effect of causing the shares of those who die before the testator without issue to lapse. *Aspinall v. Duckworth*, 35 B. 307.

It is immaterial that the class may be so determined as to be incapable of increase ; as, for instance, if the class is "my nephew and nieces living at the time of my husband's decease," as tenants in common. *Dimond v. Bostock*, 10 Ch. 358 ; *Lee v. Pain*, 4 Ha. 201, 250 ; *Leigh v. Leigh*, 17 B. 605.

Gift to a class incapable of increase.

And no person incapacitated from taking at the death of the testator is looked upon as a member of the class, so that, for instance, the share of a member of the class incapacitated from taking because he witnessed the will, goes to the other members. *Young v. Davies*, 2 Dr. & Sm. 167 ; *Fell v. Biddulph*, L. R. 10 C. P. 701 ; *In re Coleman and Jarrom*, 4 Ch. D. 165.

No person incapable at the testator's death of taking is a member of the class.

Chap. L.

Appointment
to object not
capable of
taking.

This doctrine does not apply to cases where property is appointed under a power to objects and non-objects. In such cases the objects of the power only take the shares they would have taken if the whole appointment had been valid and the rest goes as in default. *Harvey v. Stracey*, 1 Dr. 137; *In re Farncombe's Trusts*, 9 Ch. D. 652.

But where by will under a power property is appointed to objects of the power, and by a codicil which does not purport to revoke the will, part of the same property is appointed to non-objects, the original appointment takes effect over the whole property. *Duguid v. Fraser*, 31 Ch. D. 449; *In re Wells' Trusts*; *Hardisty v. Wells*, 42 Ch. D. 646.

Revocation of
the share of a
member of
the class.

When there is a gift to a class the revocation of the gift to one of the members of the class does not cause a lapse, but the whole goes to the other members of the class. *Shaw v. MacMahon*, 4 D. & War. 431.

And a gift of residue to several persons and to A. if living, or to several persons and to such of the children of A. as are living at the date of the will, does not lapse as to the share of A. or the children of A. if A. is dead, or there are no children living at the date of the will. *Re Hornby*, 7 W. R. 729; *In re Spiller*; *Spiller v. Madge*, 18 Ch. D. 614; see *Sanders v. Ashford*, 28 B. 609.

Gift of aliquot
shares to
named
persons.

A gift of aliquot shares to several named persons as tenants in common is not a gift to a class, and the shares of any dying before the testator lapse. *Cresswell v. Cheslyn*, 2 Ed. 123; *Ramsay v. Shelmerdine*, L. R. 1 Eq. 129.

Nor is a gift to a class of persons "before mentioned," the persons having been previously named, a gift to a class. *Re Gibson*, 2 J. & H. 656.

A gift to "the five daughters" of A., or to "my nine children," is not a gift to a class. *In re Smith's Trusts*, 9 Ch. D. 117; *In re Stansfield*, 15 Ch. D. 84.

The result is the same if the gift is to a class the members of which are then named. *Bain v. Lescher*, 11 Sim. 397.

And a gift to my wife's brother and sister and my brothers and sister equally, when the testator had at the date of the will three brothers and one sister, was held a *designatio per-*

sonarum, and the shares of two brothers who died before the testator lapsed. *Havergal v. Harrison*, 7 B. 49. Chap. L.
Beaver.

A gift to "my executors herein-named" has been held a gift to a class, the gift being attached to the office and therefore passing wholly to those who survive to perform the office. *Knight v. Gould*, 2 M. & K. 295. Whether a gift to named executors is subject to lapse.

But this is not the case if the gift, though the donees happen to be executors, is not given to them in respect of their office. *Barber v. Barber*, 3 M. & Cr. 688; *Hoare v. Osborne*, 12 W. R. 397.

It is clear that a gift to A., and the children of B., may in effect be a gift to a class, if the testator treats the legatees as a class. *Re Stanhope's Trusts*, 27 B. 201; *In re Jackson*; *Shiers v. Ashworth*, 25 Ch. D. 162. Gift to a class and a named individual.

And a direction to include an individual in the class does not make it the less a class, as in a gift equally to all my children, including W. *Shaw v. MacMahon*, 4 D. & War. 431.

On the other hand, a gift to surviving children and W. is not a gift to a class, and the share of W. will lapse by his death before the testator. *Drakeford v. Drakeford*, 33 B. 43; *Re Chaplin's Trust*, 12 W. R. 147; 33 L. J. Ch. 183; *Aspinall v. Duckworth*, 35 B. 307; *In re Allen*; *Wilson v. Atter*, 44 L. T. N. S. 240; 29 W. R. 480. See *Clark v. Phillips*, 17 Jur. 886; *In re Featherstone's Trusts*, 22 Ch. D. 111.

In such a case, however, if there is a direction that the interests are to be vested at the testator's death, there will be no lapse, but the gift goes to those only who survive the testator. *In re Featherstone's Trusts*, 22 Ch. D. 111.

RESULTING TRUSTS.

When an estate is devised subject to a charge, and the purpose for which the charge is created fails, the charge sinks for the benefit of the devisee. *A.-G. v. Milner*, 3 Atk. 112; *Jackson v. Hurlock*, Amb. 487; 2 Ed. 263; *King v. Denison*, 1 V. & B. 261; *Tucker v. Kayess*, 4 K. & J. 339; *Heptinstall v. Gott*, 2 J. & H. 449. Devise subject to a charge which fails.

Chap. I.

Where the devise is clearly subject to a charge it makes no difference that the money to be raised by the charge is given to purposes such as a charity, which, if valid, would in all events give it away from the devisee. *Baker v. Hall*, 12 Ves. 497; *Cooke v. Stationers' Company*, 3 M. & K. 262.

Whether the devisee takes subject to, or what remains after satisfying charge.

But where there is no express charge it must depend upon the general intention whether the particular gift is a charge, or whether the devisee was intended to take only what remains after deducting the particular gift.

Direction to pay a certain sum.

1. Thus if the lands are not expressly charged, but the devisee is directed to pay a certain sum, there has been held to be a resulting trust. *Arnold v. Chapman*, 1 Ves. Sen. 108; *Bland v. Wilkins*, cit. 1 B. C. C. 61.

Direction to raise a sum which is disposed of in all events.

2. If a sum is directed to be raised, and a full disposition is made of it, for instance to a charity, in such a way that the disposition, if valid, must in all events give the money away from the devisee of the land, who is to take only from and after the raising the money, there is a resulting trust for the heir upon failure of the particular disposition. *Tregonwell v. Sydenham*, 3 Dow, 194.

But, if the money to be raised is given for purposes which, though valid, may not take effect, the mere fact that the land is not given till after raising the money will not take the money from the devisee if those purposes fail. *In re Cooper's Trusts*, 23 L. J. Ch. 25; 4 D. M. & G. 757.

And where land was devised for life and in tail after the expiration or other sooner determination of a term of ninety-nine years limited to trustees, of which no trusts were declared, actual enjoyment by the devisee being intended, the devises were held to be subject to the term. *Sidney v. Shelley*, 19 Ves. 352.

Distinction between a charge created by the will and by a prior instrument.

Where a testator has by a previous instrument a power to charge real estates and exercises the power by will, the above rules have no application. In such a case, if the disposition made by the will fails, the charge is nevertheless raisable. *Simmons v. Pitt*, 8 Ch. 978.

Devise subject to and upon trusts.

Upon the same principle where there is a devise subject to trusts, the devisee takes the whole if those trusts fail, whereas

a devise upon trusts which fail is undisposed of. *Clarke v. Hilton*, L. R. 2 Eq. 810; *Fenton v. Hawkins*, 9 W. R. 300; *Briggs v. Penny*, 3 Mac. & G. 546.

Chap. L.

ACCELERATION.

In the case of a devise to a person for life with remainder in fee, where the tenant for life is incapable of taking or is not *in rerum natura*, the remainder is valid and will be accelerated. Yearbook, 9 Henry VI. fo. 24 b.; Perkins, sec. 566, 567.

The same rule applies in the case of personalty. *Jull v. Jacobs*, 3 Ch. D. 703; *In re Clark*; *Clark v. Randall*, 31 Ch. D. 72.

The rule applies if the life estate is revoked by the testator or determined by a forfeiture clause. *Lainson v. Lainson*, 18 B. 1; 5 D. M. & G. 754; *Evestaff v. Austin*, 19 B. 591; *Craven v. Brady*, 4 Eq. 209; 4 Ch. 296; *In re Love*; *Green v. Tribe*, 47 L. J. Ch. 783. See, too, *Stephenson v. Stephenson*, 52 L. T. 576; *In re Townsend's Estate*; *Townsend v. Townsend*, 34 Ch. D. 357.

The result of an acceleration may be to alter the members of the class whose interest is accelerated. *Re Johnson*; *Danily v. Johnson*, 68 L. T. 20.

In the same way, powers of sale will be accelerated, but not powers to charge. *Truell v. Tysson*, 21 B. 437.

There is no distinction as regards acceleration between appointments and devises: *Craven v. Brady*, *supra*; though if the object of an appointment which is void is to benefit the persons who would take in default of appointment, and a remainder is well appointed, the remainder will not be accelerated. *Crozier v. Crozier*, 3 D. & War. 353.

Where a remainder is limited after a contingent interest there is an intestacy until it is ascertained whether the contingent interest will take effect or not. *Wade Gery v. Handley*, 1 Ch. D. 653; 3 Ch. D. 374; *Andrew v. Andrew*, 1 Ch. D. 410; see *Carrick v. Errington*, 2 P. W. 361; *D'Eyncourt v. Gregory*, 34 B. 36; *In re Townsend's Estate*, *supra*; *Greene v. Flood*, 15 L. R. Ir. 450.

Acceleration.

Revocation
or forfeiture.

Acceleration
altering class
to take.

Powers of
sale and
charging.

Whether
there is any
distinction as
regards
acceleration
between
appointments
and devises.

Chap. L.

WHO ARE ENTITLED TO INTERESTS UNDISPOSED OF.

Interests undisposed of in realty and personalty pass to the heir-at-law or next of kin, as the case may be.

Intestates'
Estates Act.

By the Intestates' Estates Act, 1890 (53 & 54 Vict. c. 29), the real and personal estate of a man who dies intestate after the 1st September, 1890, leaving a widow but no issue, if it does not exceed £500 belongs to the widow. If it does, she is entitled to £500, for which she is to leave a charge on the real and personal estate with interest at 4 per cent. from the death. The provision made by the Act is to be in addition to her rights in the residue of the property after paying the £500.

Heir or
next of kin
excluded.

The Act does not apply to cases of partial intestacy. *In re Twigg's Estate*; *Twigg v. Black*, (1892) 1 Ch. 579.

Directions excluding the heir-at-law or next of kin from any share in the testator's property will, as a general rule, be taken to have been inserted only for the purpose of the dispositions made by the will and will not exclude the heir-at-law or next of kin from taking property undisposed of. The cases on this subject are, however, not easy to reconcile.

Thus, where the testatrix directed her real and personal estate to be sold and declared that no part of the fund should in any event lapse for the benefit of the heir-at-law and showed an intention of disposing of the property by a codicil, the heir was held entitled to the proceeds of sale of real estate not disposed of. *Fitch v. Weber*, 6 Ha. 145.

Gift in lieu
of thirds.

According to the older cases, a gift to the testator's widow in lieu of all claims upon his estate or in lieu of thirds, does not deprive her of a share in property undisposed of. But see *Coyne v. Duigan*, (1894) 1 I. R. 138.

Complete
disposition
attempted.

This has been so held where a complete disposition was attempted to be made by the testator. *Pickering v. Lord Stamford*, 2 Ves. Jun. 272, 581; 3 Ves. 332, 492.

Intestacy on
face of will.

And the same rule has been applied in cases where there was on the face of the will an intestacy. *Johnson v. Johnson*, 4 B 318; *Tavernor v. Grindley*, 32 L. T. N. S. 424.

Possibly, if the words of exclusions are large and comprehen-

sive and there is an intestacy on the face of the will, a gift in lieu of all claims and demands would exclude the widow from a share in property undisposed of. *Lett v. Randall*, 3 Sm. & G. 83.

Chap. L.

Upon similar principles, a direction that one of the next of kin shall take no share in the testator's property will not prevent him from taking his share under the Statutes of Distribution. *Johnson v. Johnson*, 4 B. 318; *Sykes v. Sykes*, 4 Eq. 200; 3 Ch. 301; see *Ramsay v. Shelmerdine*, L. R. 1 Eq. 129; *Gould v. Gould*, 32 B. 391; *Re Holmes*; *Holmes v. Holmes*, 62 L. T. 383.

Next of kin excluded.

A limitation to the next of kin of a married woman, as if she had died unmarried, will not exclude the husband's title as administrator if there are no next of kin. *Hawkins v. Hawkins*, 7 Sim. 173.

On the other hand, a gift to a child of "ten shillings and no more," has been held to bar the child's right as next of kin where no disposition was attempted to be made by the will. *Breton v. Vachell*, 5 B. P. C. 51; 11 Vin. Ab. 185.

Gift to child of certain property and no more.

But such a clause would probably now be construed as putting the child to his election. *Re Holmes*, *supra*.

And a clause excluding some of the next of kin may be so framed as in effect to amount to a gift to the others. *Bund v. Green*, 12 Ch. D. 819; see *In re Taylor*; *Taylor v. Ley*, 52 L. T. 839.

If the testator dies without an heir, lands undisposed of by him in which he has the legal estate pass by escheat to the lord of whom they are held, if he can be ascertained, or if not to the Crown. *Viscount Downe v. Morris*, 3 Ha. 394; *Rogers v. Maule*, 1 Y. & C. C. 4; *Thruaxton v. A.-G.*, 1 Vern. 340; Co. Lit. 18 b.; *May v. Street*, Cro. Eliz. 120.

Escheat.

The Intestates' Estates Act, 1884 (47 & 48 Vict. c. 71), enacts that after the 14th August, 1884, "where a person dies without an heir and intestate in respect of any real estate consisting of any estate or interest whether legal or equitable in any incorporeal hereditament, or of any equitable estate or interest in any corporeal hereditament whether devised or not to trustees by the will of such person, the law of escheat shall apply in the

Intestates' Estates Act, 1884.

Chap. L.	same manner as if the estate or interest, above-mentioned, were a legal estate in corporeal hereditaments."
Effect of Act on rent-charge.	Before the Act, if the owner of a rent-charge died without heirs, the rent-charge merged in the land. Co. Lit. 299 b, note 261.
Equitable estates on failure of heirs.	Is the effect of the Act to keep the rent-charge alive for the benefit of the lord of the manor? In cases not affected by this Act, if a testator who dies intestate and without an heir has an equitable estate in land, the person in whom the legal estate is vested, whether as trustee or mortgagee, is entitled to the lands. <i>Burgess v. Wheate</i> , 1 Ed. 177; <i>A.-G. v. Sands</i> , 2 Freem. 129; <i>Hardres</i> , 438; <i>Beale v. Symonds</i> , 16 B. 406.
The trustee takes when there is no heir.	The trustee is beneficially entitled, though the land may be devised on trust for sale. <i>Walker v. Denne</i> , 2 Ves. Jun. 170; <i>Taylor v. Haygarth</i> , 14 Sim. 8; <i>Cox v. Parker</i> , 22 B. 168.
The Crown takes in default of next of kin.	Where lands held by trustees for the testator are devised to other trustees, the latter are entitled upon failure of the trusts if there is no heir of the testator. <i>Onslow v. Wallis</i> , 1 Mac. & G. 506. But the original trustees will be entitled, if the latter trustees are bare trustees having no active duties to perform. <i>In re Lashmar</i> ; <i>Moody v. Penfold</i> , (1891) 1 Ch. 258. In the case of copyholds the heir of a trustee who has not been admitted is entitled as against the lord. <i>Gallard v. Hawkins</i> , 27 Ch. D. 298. In the case of chattels real and personal the Crown and not the trustee is entitled on failure of next of kin. <i>Cradock v. Owen</i> , 2 Sm. & G. 241; <i>Powell v. Merritt</i> , 1 ib., 381; <i>Read v. Stedman</i> , 26 B. 495; <i>Johnstone v. Hamilton</i> , 11 Jur. N. S. 777.
Estates <i>pur autre vie</i> .	If next of kin afterwards establish a title, the Crown cannot be charged with interest on what it has received while in possession of the property, except where it administers to the estate of the deceased person. <i>In re Gosman</i> , 17 Ch. D. 771. Estates <i>pur autre vie</i> descend either to the heir-at-law or

executor, according to the limitations contained in the latest instrument affecting the estate. *Croker v. Brady*, 4 L. R. Ir. 653 ; see *More-Smyth v. Mountcashell*, (1895) 1 I. R. 44. Chap. I.

Under sect. 6 of the Wills Act, estates *pur autre vie*, of a freehold nature, given to a man and his heirs, pass, if undisposed of, to the heir subject to debts. If there is no heir they pass to the executor as part of the personal estate, whether the interest is legal or equitable. *Plunket v. Reilly*, 2 Ir. Ch. 585 ; *Reynolds v. Wright*, 25 B. 100 ; 2 D. F. & J. 590.

If there is no special occupant, the executor is entitled.

An estate *pur autre vie* limited to A. and his heirs and devised by A. to trustees their executors and administrators, on trust for B., passes on B.'s death intestate to his executor. *Croker v. Brady*, 4 L. R. Ir. 653.

RESIDUE UNDISPOSED OF.

Since Lord St. Leonards' Act, 11 Geo. 4 and 1 W. 4, c. 40, which controls the wills of testators dying after Sept. 1, 1830, the executors take the residue undisposed of for the benefit of the next of kin, unless a contrary intention is expressed in the will, parol evidence not being admissible. *Juler v. Juler*, 29 B. 34 ; *Love v. Gaze*, 8 B. 472. Effect of
Lord St.
Leonards'
Act.

Such contrary intention does not sufficiently appear by the mere fact that the testator shows that he conceived himself to have disposed of the residue. *Travers v. Travers*, 14 Eq. 275. Contrary
intention
within the
Act.

But if the testator appoints three of his children executors without expressly giving them any beneficial interest and gives reasons why he has not provided by his will for his other children, the executors will take the residue beneficially. *Harrison v. Harrison*, 2 H. & M. 237 ; see *Fuge v. Fuge*, 27 L. R. Ir. 59.

Where a testator, after making several legacies, gave to each of his executors £50 and added "I will the executors shall apply the overplus, if any, as they think fit," it was held that they took the residue as trustees for the next of kin. *Fenton v. Nevin*, 31 L. R. Ir. 478.

Chap. L.

The Act only applies where the will contains no gift of the residue.

The Act applies only where the executor would otherwise have taken the undisposed residue; it does not therefore apply where there is an express devise of the residue, whether on trusts which do not exhaust the whole or otherwise. *Saltmarsh v. Barrett*, 22 B. 474; 3 D. F. & J. 279; *Yeap Cheah Neo v. Ong Cheng Neo*, L. R. 6 P. C. 381; *Williams v. Arkle*, L. R. 7 H. L. 606.

Where there are no next of kin the Act does not apply.

If, however, there are no next of kin, Lord St. Leonards' Act does not apply and the executors will take the undisposed residue, unless a contrary intention is indicated, in which case it will go to the Crown. *Middleton v. Spicer*, 1 B. C. C. 201; *Johnstone v. Hamilton*, 11 Jur. N. S. 777; *Taylor v. Haygarth*, 14 Sim. 8; *In re Knowles*; *Roose v. Chalk*, 28 W. R. 975.

The title of executors in cases under the old law.

It becomes, therefore, necessary to consider in what cases executors would have been held excluded from the residue undisposed of under the old law.

1. They take only such residue as the testator did not intend to dispose of.

They do not take lapsed or void legacies.

a. They do not take legacies which have lapsed or are void. *Bennett v. Batchelor*, 3 B. C. C. 28; *A.-G. v. Tomkins*, AmbL 216.

Nor residue given on trust.

b. Nor do they take where the whole is expressly given to them on trusts which are void: *Dacre v. Patrickson*, 1 Dr. & Sm. 182; *Johnstone v. Hamilton*, 11 Jur. N. S. 777; or not exhaustive: *Dawson v. Clarke*, 18 Ves. 247; *Mapp v. Elcock*, 2 Ph. 793; 3 H. L. 492; or not declared. *Milnes v. Slater*, 8 Ves. 295; *Taylor v. Haygarth*, 14 Sim. 8; *Cradock v. Owen*, 2 Sm. & G. 241; *Read v. Stedman*, 26 B. 495; *Vezey v. Jamson*, 1 S. & St. 69; *Chester v. Chester*, 12 Eq. 444.

The fact, however, that the executors are made trustees for some particular and limited purpose does not affect their title to the residue. *Batteley v. Windle*, 2 B. C. C. 31; *Griffiths v. Hamilton*, 12 Ves. 299; *Pratt v. Sladden*, 14 Ves. 193.

Executors not entitled to the residue when they are treated as trustees.

2. And even when the property is not given to the executors upon trust, if they are appointed to carry out the will, or are treated as undertaking a duty and not receiving a benefit, they

take as trustees. *Androvin v. Poilblanc*, 3 Atk. 299; *Braddon v. Farrand*, 4 Russ. 87; *Giraud v. Hanbury*, 3 Mer. 150; *Lord North v. Purdon*, 2 Ves. Sen. 495; *Dillon v. Reilly*, 9 L. R. Ir. 57.

Chap. L.

But where the trust is only inferential, evidence in favour of the executors will be admitted. *Gladding v. Yapp*, 5 Mad. 56.

3. And a presumption against the executor's title is raised if the testator shows an intention to dispose of the residue, though he may not actually do so: *Bishop of Cloyne v. Young*, 2 Ves. Sen. 91; *Lord North v. Purdon*, 2 Ves. Sen. 495; *Davers v. Dewes*, 3 P. W. 40; *Mordaunt v. Hussey*, 4 Ves. 117; *Mence v. Mence*, 18 Ves. 348; or if he expresses an intention to dispose of part only of his property by his will: *Urquhart v. King*, 7 Ves. 225; or if the property is directed to go according to law. *Cranley v. Hale*, 14 Ves. 307.

Cases where the testator has not intended to dispose of all his property by his will.

In such cases evidence in support of the executor's title is admissible. *Bishop of Cloyne v. Young*, 2 Ves. Sen. 91; *Nourse v. Finch*, 1 Ves. Jun. 344; 2 Ves. Jun. 78; *In re Bacon's Will*; *Camp v. Coe*, 31 Ch. D. 460.

4. The executor takes as trustee for the next of kin :

a. If there is a legacy to a sole executor, whether general or specific, or whether in possession or reversion, or whether expressed to be for his trouble or not, or whether for life or not, if there is no gift of the remainder. *Nourse v. Finch*, 1 Ves. Jun. 344; 2 Ves. Jun. 78; *Southcot v. Watson*, 3 Atk. 226; *Seley v. Wood*, 10 Ves. 71; *Oldman v. Slater*, 3 Sim. 84; *Rachfield v. Careless*, 2 P. W. 158; *King v. Denison*, 1 V. & B. 260; *Zouch v. Lambert*, 4 B. C. C. 326; *Dick v. Lambert*, 4 Ves. 725.

A legacy to a sole executor converts him into a trustee.

It makes no difference that the executrix is the testator's wife or relation or that legacies are given to the next of kin. *Randall v. Bookey*, 2 Vern. 425; *Dick v. Lambert*, 4 Ves. 725; *Farrington v. Knightley*, 1 P. W. 543; and see note, *ib.*

If the legacy is given in general words parol evidence is admissible in support of the executor's title. *Clennell v. Lewthwaite*, 2 Ves. Jun. 465, 644; *Langham v. Sanford*, 17 Ves. 435.

Chap. I.

What legacies will not convert an executor into a trustee.

But not if it is given to him expressly for his trouble. *Rachfield v. Careless*, 2 P. W. 158.

It seems doubtful whether a contingent reversionary interest would raise a presumption against the executor's title. *Lynn v. Beaver*, T. & R. 63.

A legacy to an executor's wife will not convert him into a trustee for the next of kin. *Wilson v. Ivat*, 2 Ves. Sen. 166; *Fruer v. Bouquet*, 21 B. 33.

In these cases the presumption against the executor's title arises from the difficulty of supposing that the testator would have given him something if he meant him to have all. Therefore, if the express legacy can be accounted for on other grounds, no presumption arises. If, for instance, the legacy is an exception out of a larger gift: *Griffith v. Rogers*, 1 Eq. Ab. 245, pl. 8; *Jones v. Westcomb*, Prec. Ch. 316; and this includes the case of a gift to the executor for life, if there is a gift of the remainder: *Granville v. Beauport*, 1 P. W. 114; or if the legacy is to an executrix, a married woman, for her separate use. *Newstead v. Johnson*, 2 Atk. 45; 9 Mod. 242.

Equal legacies to several executors.

b. Equal legacies to several executors will also raise a presumption against their title to the residue. *Ommaney v. Butcher*, T. & R. 260; *In re Hudson's Trusts*, 31 W. R. 778; 52 L. J. Ch. 789.

And this presumption, it seems, is not rebutted by the fact that unequal bounty is shown them as regards real estate. *Mackleston v. Brown*, 6 Ves. 52, p. 64.

Legacies to some executors and not to others.

But legacies to some executors and not to others, or unequal legacies to all, raise no presumption against them, since the intention may be to favour some more than others. *Griffiths v. Hamilton*, 12 Ves. 299; *Pratt v. Sladden*, 14 Ves. 193; *Barker v. Hunter*, 1 B. C. C. 328; *Rawlings v. Jennings*, 13 Ves. 39; *Dawson v. Thorne*, 3 Russ. 235; *In re Knowles*; *Roose v. Chalk*, 28 W. R. 975.

Legacy to one of several executors for his trouble.

If, however, a legacy be given to one of several executors expressly for his trouble, they all take as trustees. *White v. Evans*, 4 Ves. 21; *Milnes v. Slater*, 8 Ves. 295.

But in such a case parol evidence to support their title would be admitted. *Williams v. Jones*, 10 Ves. 77.

5. If it is clear that the executors are appointed not from personal motives, but merely from convenience or because they occupy a particular position, they take as trustees. *Urquhart v. King*, 7 Ves. 224; *De Mazay v. Pybus*, 4 Ves. 644; *Sadler v. Turner*, 8 Ves. 616.

Chap. L.
Executors
appointed
for particular
reasons.

Evidence in favour of next of kin is not admissible, except to rebut evidence in favour of the executors. *White v. Williams*, 3 V. & B. 72.

CHAPTER LI.

ADMINISTRATION.

THE ORDER OF ASSETS.

Chap. LI.

THE order in which the assets of a testator are applied in administration is as follows :—

I. General personal estate.

I. The general personal estate. *Manning v. Spooner*, 3 Ves. 117.

1. And as to this, if a specific fund of personalty is charged, it is primarily liable if the residue is disposed of. *Browne v. Groombridge*, 4 Mad. 495; *Choat v. Yeates*, 1 J. & W. 102; *Evans v. Evans*, 17 Sim. 106; *Phillips v. Eastwood*, 1 Ll. & G. 294; *Webb v. De Beauvoisin*, 31 B. 573; *Vernon v. Earl Mannors*, *ib.* 623; *Longfield v. Bantry*, 15 L. R. Ir. 101.

Residue undisposed of.

2. If, however, the residue is undisposed of, the latter is primarily liable. *Holford v. Wood*, 4 Ves. 78; *Hewett v. Snare*, 1 De G. & S. 333; *Newbegin v. Bell*, 23 B. 386; *Corbet v. Corbet*, 1 R. 8 Eq. 407; see *Re Isabel Williams*; *Green v. Burgess*, 59 L. T. 310.

3. And generally it would seem that where there is no residuary gift, but there is in fact a residue of which no disposition has been attempted, this is in all cases the primary fund for payment of debts. *Howse v. Chapman*, 4 Ves. 542; *Taylor v. Mogg*, 27 L. J. Ch. 816.

Legacy given in lieu of a share of residue is payable out of the general personal estate.

Legacies, however, even if given in lieu of a share of residue, the gift of which is revoked, and thereby becomes undisposed of, are not payable out of the share undisposed of, but out of the general estate. *Sykes v. Sykes*, 4 Eq. 200; 3 Ch. 301; see *Cresswell v. Cheslyn*, 2 Ed. 123; 3 B. P. C. 246; see 1 Sw. 571, *n.*

But the testator may direct them to be paid out of the revoked share of residue. *In re Wood's Will*, 29 B. 236; *Walsh v. Walsh*, 1 R. 4 Eq. 396.

Chap. LI.

A specific legacy falling into the residue by reason of lapse bears its rateable proportion with the other residue. *Scott v. Forristall*, 10 W. R. 37; *Morley v. Tunstall*, 7 Eq. 416, n.

Specific legacy lapsed.

4. On the question whether a lapsed share of residue is applicable in payment of debts in priority to a share effectually disposed of:—

Whether a lapsed share of residue is applicable before a share well disposed of.

a. If there is a general charge of debts, a lapsed share only contributes rateably. *Eyre v. Maraden*, 4 M. & Cr. 231; *Burt v. Sturt*, 10 Ha. 415; *Oddie v. Brown*, 4 De G. & J. 179; see *Elborne v. Goode*, 14 Sim. 165; *Ralph v. Carrick*, 5 Ch. D. 984.

b. The same rule applies where there is no charge of debts. *Tretkewy v. Helyar*, 4 Ch. D. 53; *Fenton v. Wills*, 7 Ch. D. 33; *Blann v. Bell*, 7 Ch. D. 382; overruling, so far as *contra*, *Gowan v. Broughton*, 19 Eq. 77; see *In re Jones*; *Jones v. Caless*, 10 Ch. D. 40.

No charge of debts.

Upon this principle, if a mixed residue of pure and impure personalty was given to a charity, so that the gift failed as regards the impure personalty, the latter was not the primary fund as against the other portion, the gift of which took effect, but debts were payable rateably out of both. *A.-G. v. Lord Winchelsea*, 3 B. C. C. 373; *S. C. A.-G. v. Hurst*, 2 Cox, 364; *Blann v. Bell*, 7 Ch. D. 382.

II. Real estate devised or ordered to be sold for payment of debts, whether it descends to the heir or not. *Milnes v. Slater*, 8 Ves. 295; *West v. Lawday*, 1 R. 2 Eq. 517; *Phillips v. Parry*, 22 B. 279; *Stead v. Hardaker*, 15 Eq. 175.

II. Real estate devised for payment of debts.

III. Real estate not charged with debts which descends, because no disposition has been attempted. *Davies v. Topp*, 1 B. C. C. 527; *Harmood v. Oglander*, 8 Ves. 125; *Manning v. Spooner*, 3 Ves. 117; *Sellon v. Watts*, 9 W. R. 847; *Wood v. Ordish*, 3 Sm. & G. 125; *Barber v. Wood*, 4 Ch. D. 885.

III. Real estate descended not charged with debts.

IV. Real estate charged with payment of debts and devised or descended rateably. *Wood v. Ordish*, 3 Sm. & G. 125; *Peacock v. Peacock*, 13 W. R. 516; 34 L. J. Ch. 315; *Ryves v.*

IV. Real estate charged with debts and devised or descended.

Chap. LI.

Ryves, 11 Eq. 539 ; *Stead v. Hardaker*, 15 Eq. 175 ; *Barber v. Wood*, 4 Ch. D. 885 ; see, however, *Williams v. Chitty*, 3 Ves. 545.

V. General legacies.

Right of pecuniary legatees against real estate charged with debts.

V. General pecuniary legacies rateably.

The right of the pecuniary legatees as against real estate charged with payment of debts, appears to rest on an anomalous application of the doctrine of marshalling. If the land is devised subject to payment of debts creditors have two funds. If they exhaust the personal estate, legatees may stand in the place of the creditors against the real estate. It is, however, settled that a charge of debts on real estate does not exonerate the personalty from its primary liability to pay debts. It is difficult, therefore, to see how the doctrine of marshalling applies.

If fund A. is properly applicable before fund B., what right have the owners of fund A. to take any part of fund B. because their own fund is applied in its proper order? The doctrine is, however, established by a long line of cases, which it is now too late to reconsider. *Haslewood v. Pope*, 3 P. W. 322 ; *Arnold v. Chapman*, 1 Ves. Sen. 108, 110 ; *Foster v. Cook*, 3 B. C. C. 347 ; *Bradford v. Foley*, 3 B. C. C. 351 n. ; *Webster v. Alsop*, 3 B. C. C. 352 n. ; *Aldrich v. Cooper*, 8 Ves. 381, 396 ; *Paterson v. Scott*, 1 D. M. & G. 531 ; *Rickard v. Barrett*, 3 K. & J. 289 ; *Surtees v. Parkin*, 19 B. 406 ; *Re Stokes* ; *Parsons v. Miller*, 67 L. T. 223, where *Re Bate* ; *Bate v. Bate*, 43 Ch. D. 600 is considered, and see *In re Butler* ; *Le Bas v. Herbert*, (1894) 3 Ch. 250.

Distinction between express and implied charge.

The cases do not draw any distinction between an express charge of debts and a charge of debts implied from a general direction to pay debts. In *Bradford v. Foley* there appears to have been only a general direction to pay debts. The judgment in *In re Bate*, where there was also only a direction to pay debts, did not lay any stress on this circumstance.

The doctrine is very similar to the doctrine established before Locke King's Act, that pecuniary legatees are entitled to stand in the place of a mortgagee against mortgaged real estate if the personal estate is exhausted by the mortgagee, a doctrine which seems to be equally unfounded in principle.

though established as the rule of the Court. See *Forrester v. Leigh*, Amb. 171; *Wythe v. Henniker*, 2 M. & K. 635, 644. Chap. II.

The liability of pecuniary legatees to be applied before residuary devisees is settled by *Mirehouse v. Scaife*, 2 M. & Cr. 695; *Gibbins v. Eyden*, 7 Eq. 371; *Collins v. Lewis*, 8 Eq. 708; *Dugdale v. Dugdale*, 14 Eq. 234; *Tomkins v. Coulthurst*, 1 Ch. D. 626; *Farquharson v. Floyer*, 3 Ch. D. 109, not following *Hensman v. Fryer*, 3 Ch. 420. Liability of legatees as against residuary devisees.

In these cases the real estate was devised in words which did not make debts and legacies a charge within the rule in *Greville v. Browne*. If there had been such a charge different considerations would have applied.

1. As between general legacies the further question may arise if there is no residuary gift, whether a lapsed pecuniary legacy exonerates those that take effect:— Whether lapsed legacy is applicable before those effectually given.

a. Where all the legacies are subject to a charge of debts, a lapsed pecuniary legacy only contributes rateably. *Howse v. Chapman*, 4 Ves. 542.

b. Where there is no charge of debts possibly on the principle of *Gowan v. Broughton*, 19 Eq. 77; *Scott v. Cumberland*, 18 Eq. 578, a lapsed legacy may be primarily applicable; see, however, p. 657, *ante*; and see *In re Ham's Trusts*, 2 Sim. N. S. 106.

2. As to what are general legacies for the purpose of abatement:—

Legacy duty directed to be paid on a specific legacy is a general legacy and abates with the general legacies. *Farrer v. St. Catherine's Coll.*, 16 Eq. 19; see *Wilson v. O'Leary*, 17 Eq. 419; *In re Wilkins*; *Wilkins v. Rotherham*, 27 Ch. D. 703. What are general legacies for purposes of abatement.

And annuities for the purpose of abatement rank with general legacies. *Miller v. Huddleston*, 1 Mac. & G. 513.

A rent charge, however, or annuity issuing out of the land, has priority over legacies charged upon the land in the event of deficiency of the personalty. *Creed v. Creed*, 11 Cl. & F. 491; *In re Briggs*; *Briggs v. George*, 29 W. R. 925. Rent charges.

In estimating the value of annuities for purposes of abatement their value is to be taken at the time when the estimate How the value of annuities is to be calculated.

Chap. LI.

is made; thus the value of the annuity of an annuitant who is dead is the sum of the payments which would have been made to him in respect of it, and the value of a reversionary annuity which has come into possession is its present value according to the Government tables at the time of abatement, *plus* any arrears due upon it. *Todd v. Bielby*, 27 B. 353; *Potts v. Smith*, 8 Eq. 683; *Delves v. Newington*, 52 L. T. 512.

The same rule applies where all the annuitants are living. *Heath v. Nugent*, 29 B. 226; *In re Wilkins*; *Wilkins v. Rotherham*, 27 Ch. D. 703.

Where legacies and annuities are charged on real estate, powers of distress and entry conferred upon the annuitants do not give the annuities priority over the legatees. *Roper v. Roper*, 3 Ch. D. 714.

3. Priority of general legacies, *inter se* :—

Legacies for valuable consideration have priority.

a. As between general legatees, legacies given for valuable consideration, as for debts or instead of dower, have priority. *Blower v. Morret*, 2 Ves. Sen. 420; *Heath v. Dendy*, 1 Russ. 543; *Norcott v. Gordon*, 14 Sim. 258; *Bell v. Bell*, 6 Ir. Eq. 239; *Davies v. Bush*, 1 You. 341; *Stahlschmidt v. Lett*, 1 Sm. & G. 421.

A legacy, however, in lieu of dower, where the testator has no land out of which the widow is dowable, or disposes of his land by his will so as to destroy her dower, has no priority. *Acey v. Simpson*, 5 B. 35; *Roper v. Roper*, 3 Ch. D. 714; *In re Greenwood*; *Greenwood v. Greenwood*, (1892) 2 Ch. 295.

A legacy to an executor for his trouble has no priority. *Duncan v. Watts*, 16 B. 204.

A legacy to the testator's wife for her immediate requirements has no priority. *Blower v. Morret*, 2 Ves. Sen. 420; *Cazenove v. Cazenove*, 61 L. T. 115; *In re Schweder's Estate*; *Oppenheim v. Schweder*, (1891) 3 Ch. 44. *In re Hardy*, 17 Ch. D. 798, must be considered overruled.

Time of payment creates no priority.

b. Legacies payable at the death of a tenant for life or at some other future period, do not abate before other legacies. *Miller v. Huddleston*, 3 Mac. & G. 513; *Street v. Street*, 2 N. R. 56; *Nickiesson v. Cockill*, 3 D. J. & S. 622.

Legacies

The words "in the first place," "in the next place," or the

word "afterwards," used in introducing legacies, create no priority between them. *Thwaites v. Forman*, 1 Coll. 409; *Beeston v. Booth*, 4 Mad. 161; *Whitehouse v. Insole*, 7 L. T. N. S. 400; see *In re Hardy*; *Wells v. Barwick*, 17 Ch. D. 798.

Chap. LI.
introduced by
"firstly,"
"secondly."

Annuities to become payable when all the legacies are paid and annuities payable immediately abate *pari passu*. *Ingham v. Daly*, 9 L. R. Ir. 484.

c. But legacies given on the supposition that there will be more than enough to pay prior legacies abate first. *A.-G. v. Robins*, 2 P. W. 23; *Stammers v. Halliley*, 12 Sim. 42.

Legacies given
on supposition
of a surplus.

And a direction that certain legacies given for life are to become applicable on the death of the legatees to the payment of other legacies will give the legatees for life priority. *Brown v. Brown*, 1 Kee. 275; see *Haynes v. Haynes*, 3 D. M. & G. 590.

Legacies for
life applicable
on the death
of the
legatees.

And where real estate given, subject to certain annuities, is made applicable in aid of the personalty to the payment of legacies subject to those annuities, the annuities have priority over the legacies. *Earl of Portarlington v. Damer*, 4 D. J. & S. 161; see *Coore v. Todd*, 7 D. M. & G. 520.

Real estate
subject to
annuities
made appli-
cable in aid of
personalty.

And, of course, when a particular legacy is given and the residue is then distributed in certain sums, the particular legacy has priority over all the others. *Gyett v. Williams*, 2 J. & H. 429; see *In re Hardy*; *Wells v. Barwick*, 17 Ch. D. 798.

4. Priority between general and residuary legatees :—

a. As a general rule the residuary legatee is entitled to nothing till all the particular legacies given by the will are satisfied in full.

General
legacies have
priority over
residue.

Thus, a gift of the rest of a specific fund after payment of debts and funeral expenses, where legacies have been given as well, is a gift of the residue after payment of the legacies as well as the debts and funeral expenses. *Foxen v. Foxen*, 3 N. R. 452; 13 W. R. 33.

In the same way, where a fund is set apart to pay annuities and is directed upon the death of the annuitants respectively to fall into the residue, if the fund is insufficient to pay the annuities, the residuary legatee is entitled to nothing till all the legacies and annuities have been paid in full. *Arnold v.*

Fund set
apart to pay
annuities.

Chap. LI. *Arnold*, 2 M. & K. 374; *Anderson v. Anderson*, 33 B. 223; *In re Tootal's Estate*, 2 Ch. D. 628.

And when two legacies are directed to be paid out of a fund which turns out too small to pay both, and one of them lapses, the other legacy gets the benefit of the lapse. *In re Tunno*; *Raikes v. Raikes*, 45 Ch. D. 66.

Direction for abatement.

b. It would seem that a direction that in the event of insufficiency of assets all the beneficiaries are to abate, does not entitle the residuary legatee to a fund which is released by the death of a tenant for life. *In re Lyne's Estate*; *Sands v. Lyne*, 8 Eq. 482.

On the other hand, if annuities are directed to abate in favour of legatees or *vice versa*, in the event of deficient assets the abatement is permanent and a fund, falling in is not applicable to increase gifts which have abated. *Farmer v. Mills*, 4 Russ. 86; *Hichens v. Hichens*, 25 W. R. 249.

Loss of assets falls on the residue.

c. Upon similar principles, where assets have been lost after the death of the testator, the loss falls on the residuary legatee in the first instance. *Wilmot v. Jenkins*, 1 B. 401; *Baker v. Farmer*, L. R. 3 Ch. 537. *Dyose v. Dyose*, 1 P. W. 305 is overruled; see *Fonnereau v. Poyntz*, 1 B. C. C. 478; *Humphreys v. Humphreys*, 2 Cox, 186; *Baker v. Farmer*, *supra*.

Where assets are wasted after some legacies have been satisfied, the satisfied legatees cannot be called on to refund by the other legatees; and similarly if assets are wasted after one of several residuary legatees has received his share, he cannot be called on to refund by the other residuary legatees. *Fenwick v. Clarke*, 4 D. F. & J. 240; *Peterson v. Peterson*, 3 Eq. 111; *In re Winslow*; *Frere v. Winslow*, 45 Ch. D. 349; *In re Lepine*; *Dowsett v. Culver*, (1892) 1 Ch. 210.

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VI. Real estate devised not charged with debts and specific gifts.

VI. Real estate devised, not charged with debts, including residuary real estate, and specifically bequeathed personal estate rateably. *Hensman v. Fryer*, 3 Ch. 420 (see *Lancefield v. Iggulden*, 10 Ch. 136); *Jackson v. Pease*, 19 Eq. 96.

Lapsed realty.

It seems to be the better opinion that real estate devised not charged with debts but descending by reason of lapse is applicable in the same order. *Blann v. Bell*, 47 L. J. Ch. 120; 7 Ch. D. 382; *Luckcraft v. Pridham*, 48 L. J. Ch. 636. *Scott v*

Cumberland, 18 Eq. 578, would probably not be followed; see *Astley v. Micklethwait*, 15 Ch. D. 59, 66; *Trethewy v. Helyar*, 4 Ch. D. 53; *Row v. Row*, 7 Eq. 414; *Hurst v. Hurst*, 28 Ch. D. 159.

The real estate must contribute in proportion to its value without any deduction in respect of legacies or annuities charged upon it by the will. *In re Saunders-Davies*; *Saunders-Davies v. Saunders-Davies*, 34 Ch. D. 482; *In re Bawden*; *National Provincial Bank of England v. Cresswell*, (1894) 1 Ch. 693.

And the real estate must be applied in priority to the legacies and annuities so charged. *Raikes v. Boulton*, 29 B. 41; *In re Saunders-Davies*; *Saunders-Davies v. Saunders-Davies*, 34 Ch. D. 482; *In re Bawden*; *National Provincial Bank of England v. Cresswell*, (1894) 1 Ch. 693.

If an annuity is charged on a specific chattel, which is exhausted in payment of debts, the annuity is applicable *pari passu* with other specific legacies. *Long v. Short*, 1 P. W. 403, as explained in *In re Saunders-Davies*, 34 Ch. D. 482; see *Jackson v. Hamilton*, 3 J. & Lat. 702; 9 Ir. Eq. 430.

If the personal estate is insufficient to pay debts, a specific devisee or legatee of incumbered property cannot require other specific legatees or devisees to contribute to the incumbrance. A general direction to pay debts does not alter the case. *O'Neil v. Mead*, 1 P. W. 693; *Hallinwell v. Tanner*, 1 R. & M. 633; *In re Butler*; *Le Bas v. Herbert*, (1894) 3 Ch. 250.

Contribution between specific devisees or legatees.

VII. Property appointed by the will under a power of appointing, whether by deed or will or by will only. *Fleming v. Buchanan*, 3 D. M. & G. 976; *Hawthorn v. Shedden*, 3 Sm. & G. 305; *Petre v. Petre*, 14 B. 197; *Williams v. Lomas*, 16 B. 1.

VII. Property appointed.

By sect. 4 of the Married Women's Property Act, 1882, it is enacted that "the execution of a general power by will by a married woman shall have the effect of making the property appointed liable for her debts and other liabilities in the same manner as her separate estate is made liable under this Act."

Execution of general power by married woman.

The effect of the Act is to make the appointed property liable to her debts, though she may have had no separate estate

Chap. II. at the time when the debts were contracted. *In re Ann*; *Wilson v. Ann*, (1894) 1 Ch. 549.

Exercise of
general power
by married
woman.

The decisions on this subject before the Act are conflicting, but the balance of authority appears to support the following propositions:—

1. Where there is a power of appointment by will only, whether connected with a separate life estate or not, the exercise of that power does not make the property appointed available for payment of debts contracted during coverture. *Vaughan v. Vanderstegen*, 2 Drew. 165, 363; *Johnson v. Gallagher*, 3 D. F. & J. 494; *In re Roper*; *Roper v. Doncaster*, 39 Ch. D. 482. *In re Harvey's Estate*; *Godfrey v. Harben*, 13 Ch. D. 216; and *Hodges v. Hodges*, 20 Ch. D. 749, are doubted in *In re Roper*, *supra*.

But the exercise of a general testamentary power of appointment renders the property appointed available for payment of ante-nuptial debts. *In re Parkin*; *Hill v. Schwarz*, (1892) 3 Ch. 510.

2. When there is a power of appointment by deed or will connected with a separate life estate, the exercise of the power renders the property appointed available for creditors. *London Chartered Bank of Australia v. Lemprière*, L. R. 4 P. C. 572; *Mayd v. Field*, 3 Ch. D. 587. See, however, *Ex parte Gilchrist*, 17 Q. B. D. 521; *In re Roper*, *supra*.

VIII. Land is
governed by
the *lex loci*.

VIII. Land in a foreign country is governed by the *lex loci rei sitæ* and is only liable to such debts as would be cast upon it by the law of that country. *Harrison v. Harrison*, 8 Ch. 342; see *In re Hewit*; *Lawson v. Duncan*, (1891) 3 Ch. 568.

COSTS OF ADMINISTRATION.

Costs of
administra-
tion not debts.

The costs of an administration action are not debts within the meaning of a charge of debts. *Stringer v. Harper*, 26 B. 585.

The order of assets for payment of such costs is not in all respects the same as that for payments of debts.

If a particular fund is appointed, they are payable out of that.

It is now settled that a direction to pay testamentary expenses includes the costs of an administration action, except in so far as they have been increased by the administration of the real estate. *Morrell v. Fisher*, 4 De G. & S. 422; *Miles v. Harrison*, 9 Ch. 316; *Harloe v. Harloe*, 20 Eq. 471; *Penny v. Penny*, 11 Ch. D. 440; *Re Young*; *Young v. Dolman*, 44 L. T. 499; *Patching v. Barnett*, 51 L. J. Ch. 74; *In re Middleton*; *Thompson v. Harris*, 19 Ch. D. 552; see *In re Roper*; *Taylor v. Bland*, 45 Ch. D. 126.

Chap. LI.

Testamentary expenses include costs of action.

The term executorship expenses has the same meaning. *Sharp v. Lush*, 10 Ch. D. 468.

Executorship expenses.

Costs of an administration suit have been held to be included under "funeral and other expenses" and "legal expenses." *Webb v. De Beauvoisin*, 31 B. 573; *Coventry v. Coventry*, 2 Dr. & Sm. 470.

Funeral and other expenses.

But the words "debts and costs of proving the will" do not include costs of a suit. *Stringer v. Harper*, 26 B. 585; see *Alsop v. Bell*, 24 B. 451.

Browne v. Groombridge, 4 Mad. 495, and *Gilbertson v. Gilbertson*, 34 B. 354, where the costs of a special case were held not included in testamentary expenses, and *In re Biel's Estate*, 16 Eq. 577, may be considered overruled. See, too, *Brown v. Burdett*, 53 L. J. Ch. 56.

Costs of special case.

A fund charged with payment of testamentary expenses need not be retained by the executors for more than a year if no action is apprehended. *In re Cope's Trusts*, 36 L. T. N. S. 437.

If no particular fund is appointed by the testator, costs of administration are payable out of the personal estate, except in so far as they have been increased by administration of the realty, which in that case must bear the added costs. *Ripley v. Moysey*, 1 Kee. 578; *Pickford v. Brown*, 2 K. & J. 426; *Jackson v. Pease*, 19 Eq. 96; *In re Middleton*; *Thompson v. Harris*, 19 Ch. D. 552; *In re Towry's Settled Estate*; *Dallas v. Towry*, 41 Ch. D. 64, p. 87; see *In re Price*; *Williams v. Jenkins*, 31 Ch. D. 485.

Personal estate liable for costs.

The costs of administration include the costs of getting in any part of the personal estate which is in a foreign country and

What costs are included.

- Chap. II.** the payment of all duties necessary for that purpose. *Peter v. Stirling*, 10 Ch. D. 279.
- Mixed residue bears costs rateably.** Where the residue is composed of the proceeds of sale of realty directed to be converted and of personalty, given together as a mixed fund, costs of administration are payable out of the mixed fund rateably, and a lapsed share will not be applied before shares well disposed of. This is the case though the personalty may not be exonerated for the purpose of paying debts. *Luckcraft v. Pridham*, 48 L. J. Ch. 636.
- Unappointed fund not first liable.** In the case of a fund subject to a power the costs of administration will be borne rateably by appointed and unappointed shares. *Warren v. Postlethwaite*, 2 Coll. 108, 116; *Trollope v. Routledge*, 1 De G. & S. 662; *Moore v. Dixon*, 15 Ch. D. 566.
- Devised and lapsed estates.** It seems that devised and lapsed estates bear costs rateably. *Maddison v. Pye*, 32 B. 658; *Bagot v. Legge*, 2 Dr. & Sm. 259; see, however, *Scott v. Cumberland*, 18 Eq. 578, and cases cited *ante*, p. 662.
- Probate and estate duty.** Probate Duty and the old Estate Duty are payable out of the residuary personalty. *In re Bourne*; *Martin v. Martin*, (1893) 1 Ch. 188.
- The heir cannot be made liable to pay the Probate Duty. *Shepherd v. Beetham*, 6 Ch. D. 597.
- Costs of administration have precedence over any other costs directed to be paid out of the estate; for instance, costs of a suit in the probate division. *In re Mayhew*; *Rowles v. Mayhew*, 5 Ch. D. 596; *Gillooly v. Plunkett*, 9 L. R. Ir. 324; *In re Price*; *Williams v. Jenkins*, 31 Ch. D. 485.

MARSHALLING.

I. General rules.

- A fund applied out of its order is entitled to be reconped.** Where a fund has been applied out of its proper order in the administration of assets, the persons who would have been entitled to the fund may claim for the amount so applied against the fund, which ought to have been applied in priority to their own. See *Tombs v. Roch*, 2 Coll. 490; *In re Mower's Trusts*, 8 Eq. 110.

And in some anomalous cases marshalling has been allowed in favour of persons entitled to a fund which has been applied in its proper order: thus, legatees may stand against descended realty or against realty charged with debts, if the personalty has been exhausted in payment of debts. *Foster v. Cook*, 3 B. C. C. 347; *Paterson v. Scott*, 1 D. M. & G. 531; *Rickard v. Barrett*, 3 K. & J. 289; *Re Stokes*; *Parsons v. Miller*, 67 L. T. 223.

Chap. LI.

Marshalling between legatees and the heir or devisee charged with debts.

So, too, a general pecuniary legatee is entitled to stand against the mortgaged land in the place of a mortgagee who has exhausted the personal estate in payment of the mortgage. *Forrester v. Leigh*, Amb. 172; *Wythe v. Henniker*, 2 M. & K. 635; *Binns v. Nichols*, L. R. 2 Eq. 256.

Between legatees and devisees of mortgaged lands.

Pecuniary legatees are, however, not entitled to have the assets marshalled against residuary devisees, where the land is not charged with debts. *Hensman v. Fryer*, 3 Ch. 420; *Collins v. Lewis*, 8 Eq. 708; *Dugdale v. Dugdale*, 14 Eq. 234.

Between legatees and residuary devisees.

Upon similar principles it has been held that legatees are entitled to stand in the place of the vendor against an estate purchased by the testator and paid for after his death out of the general personal estate. This is clear where the estate has descended. *Sproule v. Prior*, 8 Sim. 189.

Between legatees and devisee subject to a lien for the purchase money.

And it has been so held where the estate is devised. *Birds v. Askey*, 24 B. 618; *Lord Lilford v. Powys Keck*, L. R. 1 Eq. 347. *Wythe v. Henniker*, 2 M. & K. 635, is *contra*; see *Barnwell v. Iremonger*, 1 Dr. & S. 255.

So, too, the principle of marshalling applies between legatees, some of whose legacies are charged upon realty and others not. *Hanby v. Roberts*, Amb. 127; 2 Coll. 512; Dick. 104.

Between legatees with and without a charge on realty.

But this is not the case if the claim against one of the funds fails; if, for instance, where the legacy is charged on land, the legatee dies before the time of payment. *Prowse v. Abingdon*, 1 Atk. 482; *Pearce v. Loman*, 3 Ves. 135.

Where a testator charged the whole of his estate with the payment of debts rateably, and the debts were paid exclusively out of the general personal estate, it was held that the specifically bequeathed personal estate, and the real estate were bound to

Chap. II.

pay interest on the proportion due from them from the time when the debts were paid. *Ashworth v. Munn*, 34 Ch. D. 391.

II. Marshalling in the case of charities :

Assets not
marshalled
in favour of
charities.

In cases not within the Mortmain and Charitable Uses Act, 1891, when pure and impure personalty is given to charity, the court will not marshal the assets so as to cast the debts on the impure personalty, unless an intention can be gathered from the will that the assets are to be marshalled. *Gaskin v. Rogers*, L. R. 2 Eq. 284; *Wigg v. Nicholl*, 14 Eq. 92; see *Biggar v. Eastwood*, 19 L. R. Ir. 49, as to the Irish practice.

In the absence of such an intention the charitable legacies will abate in the proportion of the pure to the impure personalty, the value being taken as at the time of the testator's death. *Calvert v. Armitage*, 2 N. R. 60; *Luckcraft v. Pridham*, 48 L. J. Ch. 636, 639.

Direction that
charities are
to be paid
out of pure
personalty.

A direction that the charities are to be paid out of pure personalty will give them priority over other legatees as regards the pure personalty, but will not release the pure personalty from bearing its proportion of the debts. *Robinson v. Geldard*, 3 De G. & S. 499; 3 Mac. & G. 735; *Tempest v. Tempest*, 2 K. & J. 635; 7 D. M. & G. 470; *Beaumont v. Oliveira*, 6 Eq. 534; 4 Ch. 309; *Lewis v. Boetefeur*, 38 L. T. 93; W. N. 1879, p. 11; see, however, *Nickisson v. Cockill*, 3 D. J. & S. 622.

Direction that
residue given
to charity is
to consist
of pure
personalty.

But a gift of residue to charity with a direction that the residue so given is to consist of pure personalty, following a provision for payment of debts out of realty and out of residuary personalty only so far as the realty will not extend, throws the debts on the impure personalty in default of realty. *Wills v. Bourne*, 16 Eq. 487; see *In re Arnold*; *Ravenscroft v. Workman*, 37 Ch. D. 637.

The same is the effect of a direction to reserve the pure personalty for charities. *Miles v. Harrison*, 9 Ch. 316; see *In re Pitt's Estate*; *Lacy v. Stone*, 33 W. R. 653.

Personalty
given speci-
fically.

A gift to a charity of such part of the testator's personal estate as he can so bequeath is specific and throws the debts on

assets applicable in priority to specific legacies. *Shepherd v. Beetham*, 6 Ch. D. 597. Chap. LI.

If the testator exonerates the pure personalty from debts it must nevertheless bear its share of the costs of administration if they are not provided for. *In re Fitzgerald*; *Adolph v. Dolman*, 26 W. R. 53.

CHARGE OF DEBTS.

I. What debts it includes :

A direction to pay debts includes all the legal debts of the testator subsisting at his death, but not debts barred by statute. *Burke v. Jones*, 2 V. & B. 275; *Maxwell v. Maxwell*, L. R. 4 H. L. 506; see *Hawkins v. Hawkins*, 13 Ch. D. 470. Charge of debts includes debts subsisting at the death.

A trust for payment of debts will not prevent the statute from continuing to run. *Scott v. Jones*, 4 Cl. & F. 382. Trust to pay debts.

Possibly, a direction to pay specific debts barred by statute would revive them. See *Clinton v. Brophy*, 10 Ir. Eq. 139; *In re Bermingham*, I. R. 4 Eq. 187; *In re Warnoch's Estate*, I. R. 11 Eq. 212.

A charge of debts will include damages accrued after the testator's death on an equitable liability to indemnify and damages recovered in respect of a covenant broken after the testator's death. *Willson v. Leonard*, 3 B. 373; *Morse v. Tucker*, 5 Ha. 79. Damages accrued after the death.

And though there may be words limiting the debts to a particular class of debts, such as debts due at a particular period of the testator's life, the Court will lean to the wider construction, so as to include all the debts. *Bridgman v. Dove*, 2 Atk. 201; *Dormay v. Borradaile*, 10 B. 263; *Bermingham v. Burke*, 2 J. & Lat. 699. Debts due at a particular time.

A direction to pay the debts of another person includes the debts subsisting at his death, but not debts barred by statute. *O'Connor v. Haslam*, 5 H. L. 170; see, too, *Martin v. Smyth*, 3 L. R. Ir. 417; 5 *ib.* 266. Direction to pay debts of another.

But a direction to deduct from the share of a legatee the debts due from him to other legatees will include debts barred by statute, where the testator's intention is, that the debts in Direction to deduct debts due from a legatee.

Chap. II.

question should be treated as if they were advances made by himself. *Poole v. Poole*, 7 Ch. 17.

So where a share of residue is given to a person and a debt due from him is directed to be deducted, the whole debt and not merely what can legally be recovered is to be deducted. *Mathews v. Keble*, 4 Eq. 467; 3 Ch. 691.

II. Upon what property a charge of debts and legacies attaches :

Charge of debts and legacies extends to specific devisees.

A charge of debts and legacies on all the property of the testator charges them on specifically devised real estate. *Maskell v. Farrington*, 3 D. J. & S. 338; *Manno v. Greener*, 14 Eq. 456; see *Earl of Portarlington v. Damer*, 4 D. J. & S. 161.

Charge of legacies only is confined to residuary lands.

A charge of debts and legacies by the will would not affect lands specifically devised by a codicil. *Quain v. Harvey*, 5 L. R. Ir. 622; *Wheeler v. Claydon*, 16 B. 169.

A general charge of legacies merely will not be extended to lands specifically devised, but will be confined to residuary lands. *Spong v. Spong*, 1 Y. & J. 300; 3 Bl. N. S. 84; 1 D. & Cl. 365; *Conron v. Conron*, 7 H. L. 168; *Campbell v. McConaghy*, 1 R. 6 Eq. 20.

It seems indifferent whether the lands specifically given are expressly subject to certain other charges or not. *Ib.*

Back rents.

A legatee whose legacy is charged on land is not entitled to back rents. *Garfitt v. Allen*, 37 Ch. D. 48.

A direction to executors to realise such part of the testator's estate as they think right to pay legacies is to be limited to property which the executors take as such and does not charge the real estate. *In re Cameron*; *Nixon v. Cameron*, 26 Ch. D. 19.

III. How a charge of debts is created :

Charge on realty in case the personalty should be insufficient.

A charge of debts upon realty "in case the personal estate should be insufficient for their payment" is in effect a general charge of debts, as the additional words only express what would be implied without them. *Greetham v. Colton*, 34 B. 615.

When sufficiency ascertained.

The time for ascertaining whether the personalty is sufficient is the death of the testator. If the personal estate becomes insufficient through the fault of the executors, the charge will not

take effect unless the defaulting executors are also devisees of the land. *Humble v. Humble*, 2 Jur. 696 ; *Howard v. Chaffers*, 2 Dr. & Sm. 236 ; *Richardson v. Morton*, 13 Eq. 123.

Chap. LI.

1. General direction to pay debts :

A general direction to pay debts charges them upon real estate devised by the will. *Clifford v. Lewis*, 6 Mad. 33 ; *Ball v. Harris*, 8 Sim. 485 ; 4 M. & Cr. 264 ; *Shaw v. Borrer*, 1 Kee. 559 ; *Harding v. Grady*, 1 D. & War. 430 ; *Elliot v. Montgomery*, 1 R. 7 Eq. 214.

General direction to pay debts charges realty.

Whether real estate would be charged by such a direction where the will only attempts to dispose of personalty seems doubtful. The remarks of Sir R. P. Arden, in *Shallcross v. Finden*, 3 Ves. 739, probably only contemplate a case of lapse.

Whether realty left to descend would be charged.

A subsequent express charge of particular debts upon certain estates or upon all the real estate will not overrule the general direction. *Taylor v. Taylor*, 6 Sim. 246 ; *Forster v. Thompson*, 4 D. & War. 303. *Douce v. Lady Torrington*, 2 M. & K. 600, is overruled.

Subsequent express charge of certain debts on particular estates.

Nor will a subsequent express charge of all the debts upon the personalty. *Price v. North*, 1 Ph. 85 ; *Graves v. Graves*, 8 Sim. 43 ; *Hartland v. Murrell*, 27 B. 204.

Subsequent charge of all debts on personalty.

But a subsequent express charge of all the debts upon particular portions of the realty would, it seems, overrule the general direction. *Palmer v. Graves*, 1 Kee. 545. This distinction reconciles the case with those previously cited ; but *quære*, whether it is substantial.

Subsequent charge of all debts upon portions of the realty.

So, too, if certain real estate is expressly excepted out of a subsequent charge of debts upon a portion of the realty, the general direction is controlled. *Thomas v. Britnell*, 2 Ves. Sen. 313.

Exception of certain real estate out of a subsequent charge.

An express charge of debts on real and personal estate is not controlled by subsequent partial charges. *Wrigley v. Sykes*, 21 B. 337.

Express charge not controlled by partial charges.

Where a testator authorised his executors " to adjust and pay all claims made upon my estate," it was held that these words did not charge debts on the real estate. *In re Head's Trustees and Macdonald*, 45 Ch. D. 310.

Chap. LI.

Direction to executors to pay debts will not charge realty where no land is devised to them.

2. Direction to executors to pay debts :

a. Again, if the executor is directed to pay the debts, they are not charged upon the real estate unless real estate is expressly devised to him. *Keeling v. Brown*, 5 Ves. 359 ; *Powell v. Robins*, 7 Ves. 209 ; *Cook v. Dawson*, 29 B. 123 ; 3 D. F. & J. 127.

A direction to an executor to pay debts, followed by a devise to another person introduced by the word "then," will not charge the land. *Brydges v. Lande*, 3 Russ. 346, n. ; 3 Ves. 550 ; *Willan v. Lancaster*, 3 Russ. 108.

But if the real estate is devised "subject as aforesaid," it is charged. *Dowling v. Hudson*, 17 B. 248.

Land devised to the executors is charged.

b. If land is devised to the executors, whether in trust or not, it is charged with debts. *Barker v. Duke of Devonshire*, 3 Mer. 310 ; *Henvell v. Whitaker*, 3 Russ. 343 ; *Dormay v. Borradaile*, 10 B. 263 ; *Hartland v. Murrell*, 27 B. 204 ; *Bentley v. Robinson*, 10 Ir. Ch. 293 ; *In re Tanqueray Willaume and Landau*, 20 Ch. D. 465 ; *In re De Burgh Lawson* ; *De Burgh Lawson v. De Burgh Lawson*, 41 Ch. D. 568 ; *Re Stokes* ; *Parsons v. Miller*, 67 L. T. 223 ; see *In re Bailey*, 12 Ch. D. 268.

Whether legacies to be paid by the executor are a charge on land specifically devised to him.

So legacies directed to be paid by the executor will be a charge on land specifically devised to him. *Alcock v. Sparhawk*, 2 Vern. 228 ; 1 Eq. Ab. 198, pl. 4 ; *Preston v. Preston*, 2 Jur. N. S. 1040 ; *Gallimore v. Gill*, 2 Sm. & G. 158 ; 4 W. R. 773. The point is, however, not free from doubt : see *Parker v. Fearnley*, 2 S. & St. 592 ; *Cross v. Kennington*, 9 B. 150 ; 10 Jur. 343 ; 15 L. J. Ch. 167.

Where the devise is for life or in tail.

It makes no difference apparently that the devise is of an estate tail or of an estate for life. *Cloudsley v. Pelham*, 1 Vern. 411 ; 1 Eq. Ab. 198, pl. 2 ; *Harris v. Watkins*, Kay, 438 ; *Cook v. Dawson*, 29 B. 123 ; see *Finch v. Hattersley*, 3 Russ. 345, n. ; *Doe d. Ashby v. Baines*, 2 C. M. & R. 23.

Devises to executors unequally.

On the other hand, if land is devised only to one of several executors or unequal interests are devised to them, the land is not charged. *Warren v. Davies*, 2 M. & K. 49 ; *Symons v. James*, 2 Y. & C. C. 301 ; *Wasse v. Helsington*, 3 M. & K. 495 ; *In re Bailey* ; *Bailey v. Bailey*, 12 Ch. D. 268.

Gift after

A gift of real and personal estate after payment of debts

charges both. *Withers v. Kennedy*, 2 M. & K. 607; *Moore v. Whittle*, 22 L. J. Ch. 207. Chap. II.

3. When debts are directed to be paid, and there is a gift of the residue of the real and personal estate together, the legacies and debts are charged upon the entire residue. *Greville v. Browne*, 7 H. L. 689; *Gainsford v. Dunn*, 17 Eq. 405; *In re Bailey*, 12 Ch. D. 268, 274.

payment of
debts.
Rule in
Greville v.
Browne.

The charge extends to real estate which is enumerated in the residuary devise. *Thorman v. Hilhouse*, 7 W. R. 332; 5 Jur. N. S. 563; *Bray v. Stevens*, 12 Ch. D. 162; see *Castle v. Gillett*, 16 Eq. 530.

The rule applies whether the residuary gift follows or precedes the gift of legacies, and it extends to a legacy given by a codicil as an addition to a legacy given by the will. *Elliott v. Dearsley*, 16 Ch. D. 322; *Re Hall*; *Hall v. Hall*, 51 L. T. 86.

It is immaterial whether interests in land have been already given by the will or not. *Bench v. Biles*, 4 Mad. 187; *Francis v. Clemow, Kay*, 435; *Wheeler v. Howell*, 3 K. & J. 198.

The fact that the executors are directed to pay debts and legacies, the residuary realty and personalty being devised to other persons, will not exclude the rule. *In re Brooke*; *Brooke v. Rooke*, 3 Ch. D. 630.

A gift of the testator's real and personal estate, not otherwise disposed of, has the same effect as a gift of the residue. *Hassel v. Hassel*, 2 Dick. 527; *In re Bawden*; *National Provincial Bank of England v. Cresswell*, (1894) 1 Ch. 693.

But the rule does not apply where the gift is of all the realty and the residue of the personalty. *Wells v. Row*, 48 L. J. Ch. 476; *James v. Jones*, 9 L. R. Ir. 489.

Where the whole personal estate is disposed of in certain proportions, the sums so given out of the personalty will not be charged on the realty by a residuary gift. *Gyett v. Williams*, 2 J. & H. 429. Personalty
given in
certain shares.

A devise of land upon condition of paying a legacy charges the land with the legacy. *Wigg v. Wigg*, 1 Atk. 382.

Where a testator, after charging his real estate with payment of legacies in aid of his personalty, declares that a legacy shall

T.W. X X

Chap. II.

in certain contingencies sink into the residue of his personal estate, this merely amounts to a direction that it shall sink into the fund out of which it has been provided, and not that it shall be raisable out of the real for the benefit of the personal estate. *Johnson v. Webster*, 4 D. M. & G. 474; *Re the Duke of Somerset*; *Thynne v. Seymour*, 55 L. T. 753.

4. Charge upon income or corpus:

Power to raise out of rents and profits to pay debts or legacies.

It would seem that a power to raise money out of the rents and profits would naturally mean out of the annual rents and profits, but the cases show that a power to raise a lump sum out of rents and profits will authorise a sale. See *Bootle v. Blundell*, 1 Mer. 233, *per* Lord Eldon; *Baines v. Dixon*, 1 Ves. Sen. 42.

This is clear at any rate where the object is to pay debts or legacies. *Lingon v. Foley*, 2 Ch. Ca. 205; *Anon.*, 1 Vern. 104; *Berry v. Askham*, 2 Vern. 26; *Metcalf v. Hutchinson*, 1 Ch. D. 591; *Lord Londesborough v. Somerville*, 19 B. 295.

Money payable within a given time.

Or, if the money is to be raised within a given time, and the annual rents would be insufficient to raise the money within that time. *Sheldon v. Dormer*, 2 Vern. 310; *Warburton v. Warburton*, *ib.* 420; *Gibson v. Lord Montfort*, 1 Ves. Sen. 491.

Portions.

Portions, it would seem, are on the same footing as debts, as it is to be presumed that they are to be paid within a limited time. *Trafford v. Ashton*, 1 P. W. 415; *Stanhope v. Thacker*, Prec. Ch. 435.

Gross sum payable at once.

Similarly, if a gross sum payable out of rents and profits is payable at once, it may be raised by sale. *Allan v. Backhouse*, 2 V. & B. 65; Jac. 631.

Annual rents.

But a direction to pay out of annual rents and profits does not create a charge on corpus. *In re Green*; *Baldock v. Green*, 40 Ch. D. 610.

When the annual rents only are applicable.

And if the testator treats the rents and profits as applicable for some time for the purpose of raising the money, and gives the whole lands from and after raising the money, the power will be limited to the annual rents and profits. *Small v. Wing*, 5 B. P. C. 68; see *Harper v. Munday*, 7 D. M. & G. 369; *Heneage v. Lord Andover*, 3 Y. & J. 360; *Lord Lovat v. Duchess of Leeds*, 10 W. R. 398.

Where a jointure was charged upon lands devised to several devisees and the income of a portion was fluctuating, the jointure was apportioned between the devisees in proportion to the actual income received in each year. *Ley v. Ley*, 6 Eq. 174.

EXONERATION OF PERSONALTY.

I. By express words :

The personal estate is the primary fund for payment of debts, but it may be exonerated by express words. *Morrow v. Bush*, 1 Cox, 185 ; *Young v. Young*, 26 B. 522 ; *Dawes v. Scott*, 5 Russ. 32 ; *Forrest v. Prescott*, 10 Eq. 545. Exoneration by express words.

A direction not to pay debts out of a specific fund of personalty is effectual without a gift over of the fund, though the fund may not be specifically disposed of, but falls into the residue. *Coventry v. Coventry*, 2 Dr. & S. 470. Gift over of the fund is not necessary.

When the personalty is given exonerated from debts, it is not applicable to their payment till everything else is exhausted. *Morrow v. Bush*, 1 Cox, 185 ; *Young v. Young*, 26 B. 522.

On the other hand, if land is given in exoneration of the personalty, the personalty is primarily liable if the land so given is insufficient. *Colville v. Middleton*, 3 B. 570.

Similarly as between land and residue, both given exempt from debts, the residue is primarily liable on failure of other funds. *Lord Brooke v. Earl of Warwick*, 1 H. & T. 142.

And personalty disposed of exempt from debts is exempted only for the purposes of that disposition and not in favour of next of kin, whether the property upon which the burden is thrown is personal or real estate. *Waring v. Ward*, 5 Ves. 676 ; *Dacre v. Patrickson*, 1 Dr. & S. 186 ; *Kilford v. Blaney*, 29 Ch. D. 145 ; 31 Ch. D. 56. Whether personalty exonerated is exonerated in favour of next of kin.

If the personal estate is exempted from debts and not further disposed of, it is exempted for all purposes. *Milnes v. Slater*, 8 Ves. 305 ; 1 Dr. & S. 186. See *Noel v. Noel*, 12 Pr. 214.

A conveyance of real property upon trust after the settlor's decease to pay debts will not exonerate the residuary estate passing under his will. *French v. Chichester*, 2 Vern. 568 ; 3 B. P. C. 16 ; *Trott v. Buchanan*, 28 Ch. D. 446.

Chap. LI.

But personal estate conveyed upon trust to pay debts is primarily liable. *Trott v. Buchanan*, 28 Ch. D. 446.

II. Exoneration on the general context :

1. In the absence of express words exonerating the personality from the payment of debts it is primarily liable, though other funds may be provided.

What will not exonerate the personality.

Thus, neither a charge of debts on the realty, or on a specific portion, nor a devise upon trust for sale for payment of debts, will exonerate the personality. *White v. White*, 2 Vern. 43; *Walker v. Hardwick*, 1 M. & K. 396; *Ouseley v. Anstruther*, 10 B. 453; *Quennell v. Turner*, 13 B. 240; *Hancox v. Abbey*, 11 Ves. 186; *Collis v. Robins*, 1 De G. & S. 131; *Kilford v. Blaney*, 29 Ch. D. 145; 31 Ch. D. 56; see *In re Ovey*; *Broadbent v. Barrow*, 31 Ch. D. 113.

Devise on condition of paying debts.

2. Whether a devise upon condition of paying the testator's debts will exonerate the personality seems doubtful. The better opinion seems to be that it will not. *Bridgman v. Dove*, 3 Atk. 201; *Meade v. Hide*, 2 Vern. 120; *Welby v. Rockcliffe*, 1 R. & M. 571; *Henry v. Henry*, 1 R. 6. Eq. 286; see *In re Kirk*; *Kirk v. Kirk*, 21 Ch. D. 431; *Corballis v. Corballis*, 9 L. R. Ir. 309.

Gift of a sum in exoneration of a mortgage directed to be paid by devisee.

But in a case not within Locke King's Act, a devise of mortgaged lands to A., he paying the mortgage, with a subsequent gift of a sum in exoneration of the mortgage, entitles the devisee to that sum and no more. *Lockhart v. Hardy*, 9 B. 379.

Express charge of certain debts on personality.

3. An express charge of certain debts upon the personality does not exonerate it from its primary liability to the other debts. *Brydges v. Phillips*, 6 Ves. 567; *Watson v. Brickwood*, 9 Ves. 447.

Gift of realty and personality together on trust to pay debts.

4. A gift of realty and personality together on trust to pay debts will not exonerate the personality from being primarily liable. *Boughton v. Boughton*, 1 H. L. 406; *Tench v. Cheese*, 6 D. M. & G. 453.

Gift on trust to sell and pay debts.

5. But if the realty is given upon trust for sale and blended with the personality upon trust to pay debts, the realty and personality are liable rateably. *Roberts v. Walker*, 1 R. & M. 752; *Stocker v. Harbin*, 3 B. 479; *Salt v. Chattaway*, 3 B. 576; *Dunk v. Fenner*, 2 R. & M. 557; *Fourdrin v. Gowdey*, 3

M. & K. 383; *Tatlock v. Jenkins*, Kay, 654; *Bedford v. Bedford*, Chap. LI.
35 B. 584.

And where real and personal estate are given together, with a discretionary power to trustees to sell as often as they should think fit, legacies directed to be paid out of the real and personal estate are payable *pro ratâ*. *Allan v. Gott*, 7 Ch. 439.

Discretion to trustees to sell realty.

So, too, if realty is directed to be converted and become part of the personal estate. *Bright v. Larcher*, 3 De G. & J. 148; *Simmons v. Rose*, 6 D. M. & G. 411.

Realty to be sold and form part of personal estate.

6. Where the profits and income of real and personal estate are given in moieties and an annuity is directed to be paid out of one moiety, it will be payable rateably out of the profits and income of the real and personal estate. *Falkner v. Grace*, 9 Ha. 280.

Payments out of income of realty and personalty.

Where profits and income of real and personal estate are to be accumulated during a certain time for the purpose of making certain payments and the surplus of the whole property is given together to the same persons, the income of the personalty remains primarily liable. *Boughton v. Boughton*, 1 H. L. 406.

But if there is no disposition of the surplus and large payments are directed to be made out of the rents and income of the realty and personalty, so that it appears that the testator did not contemplate a surplus, and the real estate is given subject to the payments, the realty and personalty are rateably liable. *Howard v. Dryland*, 38 L. T. 24.

An annuity charged upon land with powers of distress and entry is not payable out of personalty. *Patching v. Barnett*, 51 L. J. Ch. 74.

Annuity charged on land.

7. The fact that a mixed fund of personalty and proceeds of sale of realty is created, which is charged with debts and legacies under the rule in *Greville v. Browne* or by a general direction to pay debts, will not exonerate the personalty from its primary liability, in the absence of a direction to pay the debts and legacies out of the mixed fund. *Luckcraft v. Pridham*, 48 L. J. Ch. 636; *Wells v. Row*, 48 L. J. Ch. 476; *Elliott v. Dearsley*, 16 Ch. D. 322; *In re Ovey*; *Broadbent v. Barrow*, 31 Ch. D. 113; *In re Boards*; *Knight v. Knight*, W. N., (1895) 15.

Charge on mixed fund does not exonerate personalty.

8. A charge on the realty of debts, funeral and testamentary expenses, which latter it can hardly be supposed the personalty

Charge of funeral and

Chap. II.
testamentary
expenses on
realty.

would be insufficient to meet, will nevertheless not exonerate the personalty. *Walker v. Jackson*, 2 Atk. 624; *Gray v. Minnethorpe*, 3 Ves. 103; *Hartley v. Hurle*, 5 Ves. 540; see *Coote v. Coote*, 3 J. & Lat. 175.

Personal
estate specifi-
cally given.

But where the whole personal estate is given not as a residue but specifically and the realty is subject to all the charges to which the personalty would be liable, the personalty is exonerated; if, for instance, all the personalty is given and the realty is charged with debts, funeral expenses and costs of administration. *Greene v. Greene*, 4 Mad. 148; *Michell v. Michell*, 5 Mad. 69; *Blount v. Hipkins*, 7 Sim. 43; *Gilbertson v. Gilbertson*, 34 B. 354; see *Kilford v. Blaney*, 29 Ch. D. 145; 31 Ch. D. 56.

Legacies
charged on
land where
the personalty
is specifically
given.

The same rule applies with regard to legacies where the whole personalty is given and legacies are charged upon land. *Jones v. Bruce*, 11 Sim. 221; *Lance v. Aglionby*, 27 B. 65.

And where the personalty was specifically given and a particular estate was devised upon trust to pay debts, funeral and testamentary expenses, upon failure of that estate the general personalty and the realty were held liable *pro rata* to make up the deficiency. *Powell v. Riley*, 12 Eq. 175; this case was, however, disapproved by Jessel, M.R. See *In re Ovey*; *Broadbent v. Barrow*, 51 L. J. Ch. 665, 667.

Specific gift
of personalty
to an executor.

The fact, however, that the gift of all the personalty is to a person appointed executor is a strong argument against the exoneration of the personalty. *Brummel v. Prothero*, 3 Ves. 111; *Aldridge v. Lord Wallscourt*, 1 Ba. & Be. 312.

And when it is doubtful whether the whole personal estate is meant to be given specifically or only as a residue, the fact that funeral and testamentary expenses are not charged on the realty, as well as the debts, is an argument against exoneration. *Collis v. Robins*, 1 De G. & S. 131; *Ouseley v. Anstruther*, 10 B. 453; *Bootle v. Blundell*, 1 Mer. 193; 19 Ves. 494; see *Tower v. Lord Rous*, 18 Ves. 138.

Effect of
charge of
particular
debts on
realty.

9. There is no rule to the effect that a charge of particular debts upon realty makes the realty the primary fund for those debts. *Quennell v. Turner*, 13 B. 240; *Noel v. Lord Henley*, 7 Pr. 241; Dan. 211; see *Bickham v. Cruttwell*, 3 M. & Cr. 763.

The cases of *Hancox v. Abbey*, 11 Ves. 179, and *Evans v. Cockeram*, 1 Coll. 428, only establish, that where a debt is already a charge upon realty, a devise of lands including the mortgaged land in trust for sale and payment of the mortgaged debt, or a declaration that the mortgage is to be charged upon the land, must mean that it is to be a primary charge on the land, otherwise, as it is already a charge upon realty, the words would have no meaning.

Chap. II.

Hancox v. Abbey and
Evans v. Cockeram.

Hancox v. Abbey, however, probably comes better under another head, see p. 676 and below.

Welby v. Rockcliffe, 1 R. & M. 571, was decided on the ground that the testator had imposed the condition of paying his debts upon the devisee; and in *Clutterbuck v. Clutterbuck*, 1 M. & K. 15, there was a gift of the residue of the real and personal estate not thereinbefore otherwise disposed of, showing that the only land given was after payment of the sum directed to be raised to pay debts.

The cases where legacies given out of a particular fund have been held payable out of that fund are also distinguishable. The question in those cases has generally been, not whether the personalty was only secondarily liable, but whether it was liable at all; in other words, whether the legacy was demonstrative or specific. See, for instance, *Dickin v. Edwards*, 4 Ha. 273; *Bessant v. Noble*, 26 L. J. Ch. 236; *Fream v. Dowling*, 20 B. 624; 4 Eq. 145, *n*.

Distinction between cases of exoneration and specific gifts of interests in land.

10. Where, however, a sum is directed to be raised out of land for payment of debts and the land is not given till after such payment or only the residue of the land is given, there is a strong argument that the land was to be the primary fund. *Hancox v. Abbey*, 11 Ves. 179; *Hale v. Cox*, 3 B. C. C. 322; see *Clutterbuck v. Clutterbuck*, 1 M. & K. 15; *Noel v. Noel*, 12 Pr. 214; Lord St. Leonards' Law of Property, 363, 365; *Ion v. Ashton*, 28 B. 379; *In re Needham*; *Robinson v. Needham*, 54 L. J. Ch. 75.

Gift of lands after payment of debts.

11. Where debts have been paid out of the personal estate and the real estate is bound to bear its rateable proportion, the real estate will be charged with interest upon the amount it ought to contribute. *Ashworth v. Munn*, 34 Ch. D. 391.

CHAPTER LII.

SUGGESTIONS FOR PREPARING WILLS.

Chap. LII.

THE possible dispositions of property by testators are so infinitely various that general suggestions can be of very little use. The following points have, however, been selected as likely to be of frequent occurrence :—

1. With regard to payment of debts, if land is to be applied in exoneration of the personalty an express direction to that effect should be inserted.

2. The testator should consider whether mortgages are to be borne by the devisee or to be discharged out of the general personal estate. In the latter case a declaration to that effect should be inserted.

3. It should be ascertained whether legacies are to be free from duty or not. It is cheaper for the estate to give a legacy of £9,000 free of duty than to give a legacy of £10,000 subject to duty. If the duty is 10 per cent. the legatee gets £9000 in either case, whereas in the former case the estate pays £9,900 only instead of £10,000.

4. In the description of the subject-matter of the testator's bounty language generally intelligible should be used. Thus, terms of art, symbols, terms derived from local custom and so on should be avoided.

5. Things should be described by their permanent and not by their changeable characteristics ; for instance, description of land by occupation should be avoided.

6. In the case of specific bequests care should be taken to ascertain the exact title of the stock or other security which is the subject of the bequest, and the testator should be reminded of the liability of specific gifts to ademption by change of security or sale.

7. Inquiry should be made whether annuities given by the will are intended to be for the lives of the annuitants only or perpetual.

8. Residuary gifts should be expressed in the most general terms and enumeration of particular things should be avoided.

9. When a residue is given to several persons in succession, the testator should consider whether the tenant for life is intended to enjoy the property in the state in which it may be found at the testator's death or whether it is to be converted.

10. In the description of persons the same general caution applies as in the description of things.

11. If the gift is to a husband and wife with others, care should be taken to secure that the wife should take a separate share.

12. In the case of gifts to several persons or to classes words of severance should be introduced unless a joint tenancy is intended.

13. If illegitimate children are to be provided for, the fact that illegitimate children are intended should be unmistakeably expressed.

14. In the case of bequests to children where it is possible that children may be born after the time of distribution has arrived, the testator should consider whether he wishes all the children to be included, and, in the latter event, clear words to that effect should be introduced.

15. In the case of gifts to several classes of persons or to different generations of issue, if the distribution is intended to be *per stirpes* there should be words to that effect.

16. It will as a rule be found advisable to avoid such vague terms as relations or family.

17. In gifts of personalty, words whether of purchase or limitation appropriate to realty should be avoided, and the same applies *mutatis mutandis* to devises.

18. In the case of gifts to a parent and children, or to a parent and issue, care should be taken to show whether the children or issue were intended to take concurrently with their parent or not.

Chap. LII.

19. The difficulties arising upon the rule in *Shelley's Case* are too familiar to need comment.

20. The testator should be careful to distinguish between a recommendation and an obligation intended to be imposed on a legatee, and in cases where he merely desires to express a wish there should be an express declaration that no trust is intended.

21. Clear directions should be inserted with regard to vesting in cases where bequests are intended to be contingent upon the attainment of a given age, and care should be taken to bring clearly before the testator's mind the distinction between payment and vesting.

22. In the case of conditions imposed upon legatees there should be a gift over in the case of a clear and definite breach, and care must be taken that the breach should accurately correspond with the condition. Testators should, however, be warned that to impose any but the simplest conditions upon legatees is as a rule an invitation to litigation.

23. Care should be taken that the dispositions of the testator do not infringe the rule against perpetuity, and that there is no trust for accumulation beyond the limits allowed by statute.

24. In substitutional gifts to children inquiry should be made whether any persons satisfying the description of the members of the original class are dead at the date of the will leaving children and provision should be made accordingly.

25. In survivorship clauses, it should be clearly indicated to what period survivorship is to be referred, and whether survivorship is contemplated between individuals or between *stirpes*, but the prudent draftsman will avoid the use of the word survivor altogether.

APPENDIX.

1 VIC. CAP. 26.

AN ACT FOR THE AMENDMENT OF THE LAWS WITH RESPECT TO WILLS [3RD JULY, 1837].

THE Words and Expressions hereinafter mentioned, which in their ordinary Signification have a more confined or a different Meaning, shall in this Act, except where the Nature of the Provision or the Context of the Act shall exclude such Construction, be interpreted as follows: (that is to say,) the Word "Will" shall extend to a Testament, and to a Codicil, and to an Appointment by Will or by Writing in the Nature of a Will in exercise of a Power, and also to a Disposition by Will and Testament or Devise of the Custody and Tuition of any Child, by virtue of an Act passed in the Twelfth Year of the Reign of King *Charles* the Second, intituled *An Act for taking away the Court of Wards and Liveries, and Tenures in capite, and by Knight's Service, and Purveyance, and for Settling a Revenue upon His Majesty in lieu thereof*, or by virtue of an Act passed in the Parliament of *Ireland* in the Fourteenth and Fifteenth Years of the Reign of King *Charles* the Second, intituled *An Act for taking away the Court of Wards and Liveries, and Tenures in capite and by Knight's Service*, and to any other Testamentary Disposition; and the words "Real Estate" shall extend to Manors, Advowsons, Messuages, Lands, Tithes, Rents, and Hereditaments, whether Freehold, Customary Freehold, Tenant Right, Customary or Copyhold, or of any other Tenure, and whether corporeal, incorporeal, or personal, and to any undivided Share thereof, and to any Estate, Right, or Interest (other than a Chattel Interest) therein; and the Words "Personal Estate" shall extend to Leasehold Estates and other Chattels Real, and also to Monies, Shares of Government and other Funds, Securities for Money (not being Real Estates), Debts, Choses in Action, Rights, Credits, Goods, and all other Property whatsoever which by Law devolves upon the Executor or Administrator, and to any Share or Interest therein; and every Word importing the Singular Number only shall extend and be applied to several Persons or Things as well as one Person or Thing; and every Word importing the Masculine Gender only shall extend and be applied to a Female as well as a Male.

3. It shall be lawful for every Person to devise, bequeath, or dispose of, by his Will executed in manner herein-after required, all Real Estate and all Personal Estate which he shall be entitled

Appendix.

Meaning of
certain words
in this Act:

"Will:"

12 Car. 2,
c. 24.

14 & 15 Car.
2 (I.).

"Real
Estate:"

"Personal
Estate:"

Number:

Gender.

All property
may be dis-
posed of by

Appendix.
Will, comprising Customary Freeholds and Copyholds without Surrender, and before Admittance, and also such of them as cannot now be devised ;

Estates *pur autre vie* ;

contingent Interests ;

Rights of Entry ; and Property acquired after Execution of the Will.

As to the Fees and Fines payable by Devisees of Customary and Copyhold Estates.

to, either at Law or in Equity, at the Time of his Death, and which, if not so devised, bequeathed, or disposed of would devolve upon the Heir at Law, or customary Heir of him, or, if he became entitled by Descent, of his Ancestor, or upon his Executor or Administrator ; and the power hereby given shall extend to all Real Estate of the Nature of Customary Freehold or Tenant Right, or Customary or Copyhold, notwithstanding that the Testator may not have surrendered the same to the Use of his Will, or notwithstanding that, being entitled as Heir, Devisee, or otherwise to be admitted thereto, he shall not have been admitted thereto, or notwithstanding that the same, in consequence of the want of a Custom to devise or surrender to the Use of a Will or otherwise, could not at Law have been disposed of by Will if this Act had not been made, or notwithstanding that the same, in consequence of there being a Custom that a Will or a Surrender to the Use of a Will should continue in force for a limited Time only, or any other special Custom, could not have been disposed of by Will according to the Power contained in this Act, if this Act had not been made : and also to Estates *pur autre vie*, whether there shall or shall not be any special Occupant thereof, and whether the same shall be Freehold, Customary Freehold, Tenant Right, Customary or Copyhold, or of any other Tenure, and whether the same shall be a corporeal or an incorporeal Hereditament ; and also to all contingent, executory, or other future Interests in any Real or Personal Estate, whether the Testator may or may not be ascertained as the Person or one of the Persons in whom the same respectively may become vested, and whether he may be entitled thereto under the Instrument by which the same respectively were created or under any Disposition thereof by Deed or Will ; and also to all Rights of Entry for Conditions broken, and other Rights of Entry ; and also to such of the same Estates, Interests, and Rights respectively, and other Real and Personal Estate, as the Testator may be entitled to at the time of his Death, notwithstanding that he may become entitled to the same subsequently to the Execution of his Will.

4. Provided always, that where any Real Estate of the Nature of Customary Freehold or Tenant Right, or Customary or Copyhold, might, by the Custom of the Manor of which the same is holden, have been surrendered to the Use of a Will, and the Testator shall not have surrendered the same to the use of his Will, no person entitled or claiming to be entitled thereto by virtue of such Will shall be entitled to be admitted, except upon payment of all such Stamp Duties, Fees, and sums of money as would have been lawfully due and payable in respect of the surrendering of such Real Estate to the Use of the Will, or in respect of presenting, registering, or enrolling such Surrender, if the same Real Estate had been surrendered to the Use of the Will of such Testator : Provided also that where the Testator was entitled to have been admitted to such Real Estate, and might, if he had been admitted thereto, have surrendered the same to the Use of his Will, and shall not have been admitted thereto, no person entitled or claiming to be entitled to such Real Estate in consequence of such Will shall be entitled to be admitted to the same Real Estate by virtue thereof, except on Payment of all such Stamp Duties, Fees, Fine, and Sums of Money as would have been

lawfully due and payable in respect of the admittance of such Testator to such Real Estate, and also of all such Stamp Duties, Fees, and Sums of Money as would have been lawfully due and payable in respect of surrendering such Real Estate to the Use of the Will, or of presenting, registering, or enrolling such Surrender, had the Testator been duly admitted to such Real Estate, and afterwards surrendered the same to the Use of his Will; all which Stamp Duties, Fees, Fine, or Sums of Money due as aforesaid shall be paid in addition to the Stamp Duties, Fees, Fine, or Sums of Money due or payable on the Admittance of such Person so entitled or claiming to be entitled to the same Real Estate as aforesaid.

5. When any Real Estate of the Nature of Customary Freehold or Tenant Right, or Customary or Copyhold, shall be disposed of by Will, the Lord of the Manor or reputed Manor of which such Real Estate is holden, or his Steward, or the Deputy of such Steward, shall cause the Will by which such Disposition shall be made, or so much thereof as shall contain the Disposition of such Real Estate, to be entered on the Court Rolls of such Manor or reputed Manor; and when any Trusts are declared by the Will of such Real Estate, it shall not be necessary to enter the Declaration of such Trusts, but it shall be sufficient to state in the Entry on the Court Rolls that such Real Estate is subject to the Trusts declared by such Will; and when any such Real Estate could not have been disposed of by Will if this Act had not been made, the same Fine, Heriot, Dues, Duties, and Services shall be paid and rendered by the Devisee as would have been due from the Customary Heir in case of the Descent of the same Real Estate, and the Lord shall as against the Devisee of such Estate have the same Remedy for recovering and enforcing such Fine, Heriot, Dues, Duties, and Services as he is now entitled to for recovering and enforcing the same from or against the Customary Heir in case of a Descent.

6. If no Disposition by Will shall be made of any Estate *pur autre vie* of a Freehold Nature, the same shall be chargeable in the Hands of the Heir, if it shall come to him by reason of special Occupancy, as Assets by Descent, as in the case of Freehold Land in Fee Simple; and in case there shall be no special Occupant of any Estate *pur autre vie*, whether Freehold or Customary Freehold, Tenant Right, Customary or Copyhold, or of any other Tenure, and whether a corporeal or incorporeal Hereditament, it shall go to the Executor or Administrator of the Party that had the Estate thereof by virtue of the Grant; and if the same shall come to the Executor or Administrator either by reason of a special Occupancy or by virtue of this Act, it shall be assets in his Hands, and shall go and be applied and distributed in the same Manner as the Personal Estate of the Testator or Intestate.

7. No Will made by any Person under the Age of Twenty-one Years shall be valid.

8. Provided also that no Will made by any Married Woman shall be valid, except such a Will as might have been made by a Married Woman before the passing of this Act.

9. No Will shall be valid unless it shall be in writing, and executed in manner hereinafter mentioned; (that is to say,) it shall

Appendix.

Wills or Extracts of Wills of Customary Freeholds and Copyholds to be entered on the Court Rolls;

and the Lord to be entitled to the same Fine, &c., when such Estates are not now devisable, as he would have been from the Heir in case of Descent.

Estates *pur autre vie*.

No Will of a minor valid; nor of a Feme Covert, except such as might now be made. Every Will shall be in

- Appendix.** be signed at the Foot or End thereof by the Testator, or by some other Person in his Presence and by his Direction; and such Signature shall be made or acknowledged by the Testator in the Presence of Two or more Witnesses present at the same Time, and such Witnesses shall attest and shall subscribe the Will in the Presence of the Testator, but no Form of Attestation shall be necessary.
- Writing, and signed by the Testator and attested.** 10. No appointment made by Will, in exercise of any Power, shall be valid, unless the same be executed in manner herein-before required; and every Will executed in manner herein-before required shall, so far as respects the execution and attestation thereof, be a valid execution of a Power of Appointment by Will, notwithstanding it shall have been expressly required that a Will made in exercise of such Power should be executed with some additional or other Form of Execution or Solemnity.
- Appointments by Will to be executed like other Wills.** 11. Provided always, that any Soldier being in actual Military Service, or any Mariner or Seaman being at Sea, may dispose of his Personal Estate as he might have done before the making of this Act.
- Soldiers' and Mariners' Wills excepted.** 13. Every Will executed in manner herein-before required shall be valid without any other Publication thereof.
- Publication not to be requisite.** 14. If any person who shall attest the Execution of a Will shall at the time of the execution thereof or at any time afterwards be incompetent to be admitted a Witness to prove the Execution thereof, such Will shall not on that Account be invalid.
- Incompetency of attesting Witness not to avoid will.** 15. If any Person shall attest the Execution of any Will to whom or to whose Wife or Husband any beneficial Devise, Legacy, Estate, Interest, Gift, or Appointment, of or affecting any Real or Personal Estate (other than and except Charges and Directions for the Payment of any Debt or Debts), shall be thereby given or made, such Devise, Legacy, Estate, Interest, Gift, or Appointment shall, so far only as concerns such Person attesting the Execution of such Will, or the Wife or Husband of such Person, or any person claiming under such Person or Wife or Husband, be utterly null and void, and such Person so attesting shall be admitted as a Witness to prove the Execution of such Will, or to prove the Validity or Invalidity thereof, notwithstanding such Devise, Legacy, Estate, Interest, Gift, or Appointment mentioned in such Will.
- Gifts to an attesting Witness to be void.** 16. In case by any Will any Real or Personal Estate shall be charged with any Debt or Debts, and any Creditor, or the Wife or Husband of any Creditor, whose Debt is so charged, shall attest the Execution of such Will, such Creditor notwithstanding such Charge shall be admitted a Witness to prove the Execution of such Will, or to prove the Validity or Invalidity thereof.
- Creditor attesting to be admitted a Witness.** 17. No person shall, on account of his being an Executor of a Will, be incompetent to be admitted a Witness to prove the Execution of such will, or a Witness to prove the Validity or Invalidity thereof.
- Executor to be admitted a Witness.** 18. Every Will made by a man or Woman shall be revoked by his or her Marriage (except a Will made in exercise of a Power of Appointment, when the Real or Personal Estate thereby appointed would not in default of such Appointment pass to his or her Heir,
- Will to be revoked by Marriage.**

Customary Heir, Executor, or Administrator, or the person entitled as his or her next of Kin, under the Statute of Distributions).

19. No Will shall be revoked by any presumption of an Intention on the Ground of an Alteration in Circumstances.

20. No Will or Codicil, or any Part thereof, shall be revoked otherwise than as aforesaid, or by another Will or Codicil executed in manner herein-before required, or by some Writing declaring an Intention to revoke the same, and executed in the Manner in which a Will is herein-before required to be executed, or by the burning, tearing, or otherwise destroying the same by the Testator, or by some Person in his Presence and by his Direction, with the intention of revoking the same.

21. No Obliteration, Interlineation, or other Alteration made in any Will after the Execution thereof shall be valid or have any Effect, except so far as the Words or Effect of the Will before such Alteration shall not be apparent, unless such Alteration shall be executed in like Manner as herein-before is required for the Execution of the Will; but the Will, with such Alteration as Part thereof, shall be deemed to be duly executed if the Signature of the Testator and the Subscription of the Witnesses be made in the Margin or on some other Part of the Will opposite or near to such Alteration, or at the Foot or End of or opposite to a Memorandum referring to such Alteration, and written at the end or some other Part of the Will.

22. No Will or Codicil, or any Part thereof, which shall be in any Manner revoked, shall be revived otherwise than by the Re-execution thereof, or by a Codicil executed in manner herein-before required, and showing an Intention to revive the same; and when any Will or Codicil which shall be partly revoked, and afterwards wholly revoked, shall be revived, such Revival shall not extend to so much thereof as shall have been revoked before the Revocation of the whole thereof, unless an Intention to the contrary shall be shown.

23. No Conveyance or other Act made or done subsequently to the Execution of a Will of or relating to any Real or Personal Estate therein comprised, except an Act by which such Will shall be revoked as aforesaid, shall prevent the Operation of the Will with respect to such Estate or Interest in such Real or Personal Estate as the Testator shall have power to dispose of by will at the Time of his Death.

24. Every Will shall be construed, with reference to the Real Estate and Personal Estate comprised in it, to speak and take effect as if it had been executed immediately before the Death of the Testator, unless a contrary Intention shall appear by the Will.

25. Unless a contrary Intention shall appear by the Will, such Real Estate or Interest therein as shall be comprised or intended to be comprised in any Devise in such Will contained, which shall fail or be void by reason of the Death of the Devisee in the lifetime of the Testator, or by reason of such Devise being contrary to Law or otherwise incapable of taking effect, shall be included in the Residuary Devise (if any) contained in such Will.

26. A Devise of the Land of the Testator, or of the Land of the Testator in any Place or in the Occupation of any Person mentioned

Appendix.

No Will to be revoked by Presumption.

No Will to be revoked but by another Will or Codicil, or by a Writing executed like a Will, or by Destruction.

No alteration in a Will shall have any Effect unless executed as a Will.

No Will revoked to be revived otherwise than by Re-execution or a Codicil to revive it.

A Devise not to be rendered inoperative by any subsequent Conveyance or Act.

A Will shall be construed to speak from the Death of the Testator.

A Residuary Devise shall include Estates comprised in lapsed and void Devises.

A general Devise of

Appendix.

the Testator's Lands shall include Copyhold and Leasehold as well as Freehold Lands.

A general Gift shall include Estates over which the Testator has a general Power of Appointment.

A Devise without any Words of Limitation shall be construed to pass the Fee. The Words "die without Issue," or "die without leaving Issue," shall be construed to mean die without Issue living at the Death.

No Devise to Trustees or Executors, except for a Term or a Presentation to a Church shall pass a Chattel Interest.

in his Will, or otherwise described in a general Manner, and any other general Devise which would describe a Customary, Copyhold, or Leasehold Estate if the Testator had no Freehold Estate which could be described by it, shall be construed to include the Customary, Copyhold, and Leasehold Estates of the Testator, or his Customary, Copyhold, and Leasehold Estates, or any of them, to which such Description shall extend, as the Case may be, as well as Freehold Estates, unless a contrary Intention shall appear by the Will.

27. A general Devise of the Real Estate of the Testator, or of the Real Estate of the Testator in any Place or in the occupation of any person mentioned in his Will, or otherwise described in a general Manner, shall be construed to include any Real Estate, or any Real Estate to which such Description shall extend (as the case may be), which he may have power to appoint in any manner he may think proper, and shall operate as an Execution of such Power, unless a contrary Intention shall appear by the Will; and in like Manner a Bequest of the Personal Estate of the Testator, or any Bequest of Personal Property described in a general Manner, shall be construed to include any Personal Estate, or any Personal Estate to which such Description shall extend (as the Case may be), which he may have power to appoint in any Manner he may think proper, and shall operate as an Execution of such Power, unless a contrary Intention shall appear by the Will.

28. Where any Real Estate shall be devised to any Person without any words of Limitation, such Devise shall be construed to pass the Fee Simple, or other the whole Estate or Interest which the Testator had Power to dispose of by Will in such Real Estate, unless a contrary Intention shall appear by the Will.

29. In any devise or Bequest of Real or Personal Estate the Words "die without Issue," or "die without leaving Issue," or "have no Issue," or any other words which may import either a Want or Failure of Issue of any Person in his Lifetime, or at the Time of his Death, or an indefinite Failure of his Issue, shall be construed to mean a Want or Failure of Issue in the Lifetime or at the Time of the Death of such Person, and not an indefinite Failure of his Issue, unless a contrary Intention shall appear by the Will, by reason of such Person having a Prior Estate Tail or of a preceding Gift, being (without any Implication arising from such Words,) a Limitation of an Estate Tail to such Person or Issue, or otherwise; Provided, that this Act shall not extend to Cases where such Words as aforesaid import if no Issue described in a preceding Gift shall be born, or if there shall be no Issue who shall live to attain the Age or otherwise answer the Description required for obtaining a vested Estate by a preceding Gift to such Issue.

30. Where any Real Estate (other than or not being a Presentation to a Church) shall be devised to any Trustee or Executor, such devise shall be construed to pass the Fee Simple or other the whole Estate or interest which the Testator had power to dispose of by Will in such Real Estate, unless a definite Term of Years, absolute or determinable, or an Estate of Freehold, shall thereby be given to him expressly or by Implication.

31. Where any Real Estate shall be devised to a Trustee, without any express Limitation of the Estate to be taken by such Trustee, and the beneficial Interest in such Real Estate, or in the surplus Rents and Profits thereof, shall not be given to any Person for Life, or such beneficial Interest shall be given to any Person for Life, but the Purposes of the Trust may continue beyond the Life of such Person, such Devise shall be construed to vest in such Trustee the Fee Simple, or other the whole legal Estate, which the Testator had Power to dispose of by Will in such Real Estate, and not an Estate determinable when the Purposes of the Trust shall be satisfied.

32. Where any Person to whom any Real Estate shall be devised for an Estate Tail or an Estate in quasi Entail shall die in the lifetime of the Testator leaving Issue who would be inheritable under such Entail, and any such Issue shall be living at the Time of the Death of the Testator, such Devise shall not lapse, but shall take effect as if the Death of such Person had happened immediately after the Death of the Testator, unless a contrary intention shall appear by the Will.

33. Where any Person being a Child or other Issue of the Testator to whom any Real or Personal Estate shall be devised or bequeathed for any Estate or Interest not determinable at or before the Death of such Person shall die in the Lifetime of the Testator leaving Issue, and any such Issue of such Person shall be living at the Time of the Death of the Testator, such Devise or Bequest shall not lapse, but shall take effect as if the Death of such Person had happened immediately after the Death of the Testator, unless a contrary Intention shall appear by the Will.

34. This Act shall not extend to any Will made before the First Day of January, One thousand eight hundred and thirty-eight, and every Will re-executed or republished, or revived by any Codicil, shall for the Purposes of this Act be deemed to have been made at the Time at which the same shall be so re-executed, republished, or revived; and this Act shall not extend to any Estate *pur autre vie* of any Person who shall die before the First Day of January, One thousand eight hundred and thirty-eight.

35. This Act shall not extend to *Scotland*.

Appendix.

Trustees under an unlimited Devise, where the Trust may endure beyond the Life of a Person beneficially entitled for Life, to take the Fee.

Devises of Estates Tail shall not lapse.

Gifts to Children or other Issue who leave Issue living at the Testator's Death shall not lapse.

Act not to extend to Wills made before 1838 nor to Estates *pur autre vie* of Persons who die before 1838.

Act not to extend to Scotland.

INDEX.

ABATEMENT,

- of legacies, 659—661
 - what are legacies for purpose of, 659
 - how the value of annuities calculated, 412, 659, 660
 - legacies for valuable consideration have priority, 660
 - legacy in lieu of dower, *ib.*
 - legacy to wife to be paid at once, *ib.*
 - time of payment creates no priority, *ib.*
 - use of words "firstly," "secondly," in introducing legacies, *ib.*, 661
 - legacies on supposition of a surplus, 661
 - realty given subject to legacies abates before them, *ib.*
- between general and residuary legatees, 661—662
 - legacies have priority over residue, 661
 - fund set apart to pay annuities, *ib.*
 - direction that annuities are to abate, 662
 - loss of assets falls on residue, *ib.*
 - consent by legatees to an appropriation, 388

ABSOLUTE GIFT

- where there is, a direction to accumulate beyond majority is invalid against donee, 493
- where there is, conditions postponing enjoyment are void, 506, 507
- qualifications of, which are void for remoteness, may be rejected, 487

ABSOLUTE INTEREST IN PERSONALTY, 390—408

- what passes an,
 - words of limitation to pass,
 - executors, 390
 - heirs, heirs of the body, 390—392
 - issue, 392—394
- gift of the income of property when it passes, 394, 395
- power of disposition, when it gives, 395, 396
- effect of subsequent restrictions upon, 396, 397, 541
- distinguished from a trust (see TRUST), 398—405
- legacies to be applied for legatee's benefit, 405
- discretionary trusts (see DISCRETIONARY TRUSTS), 405—408
- cannot be given in succession, 519
- implication of (see IMPLICATION), 607—610

ACCELERATION

of power of leasing, 380
 not affected by Thellusson Act, 494
 takes place where the tenant for life is incapable of taking, 647
 by revocation or forfeiture, *ib.*
 may alter class to take, *ib.*
 distinction between powers of sale and of charging as regards, *ib.*
 no distinction between devises and appointments as regards, *ib.*
 intention not to accelerate gift in default of appointment, *ib.*
 where remainder is limited after contingent interest, *ib.*

ACCRUER, 536—538

effect of a clause of, upon vesting, 467
 clause of, will not pass accrued shares, 536
 intention that accrued are to go with original shares, 536
 consolidation of original and accrued shares, *ib.*
 words applicable to accrued shares, 537
 his or her share or shares, *ib.*
 share and shares and interest, *ib.*
 where the fund is treated as entire at the period of distribution, *ib.*
 with benefit of survivorship, *ib.*
 gift over of the whole fund, *ib.*
 where the gift is residuary, *ib.*
 restrictions of original do not extend to accrued shares, *ib.*, 538
 appointment may operate in accrued share, 538
 repeated operation of cross limitations, *ib.*, 613

ACCUMULATION, 489—494

of rents from mines may pass with surface, 169
 of income of legacies, who entitled to, 153, 154
 of past years when applicable to maintenance, 387
 trust for, during minorities of tenants in tail void, 479
 for payment of debts is valid, *ib.*
 till the fund reaches a certain sum when valid, *ib.*
 trust for, beyond limits of perpetuity is void, 489
 effect of the Thellusson Act, *ib.*
 effect of Accumulations Act, 1892, *ib.*, 490
 property given so as to involve, is within the statute, 490
 owing to neglect of trustees to apply money at once is not, *ib.*
 direction to keep up policies on the lives of children is not, *ib.*
 trust to repair and improve is not, *ib.*
 testator may select any one of the periods allowed, *ib.*
 period of twenty-one years runs from the testator's death, *ib.*
 period of minority runs only from the birth of the minor, *ib.*, 491
 whether allowable during minority of person not born at testator's death, 491
 beyond the limits of the statute is void *pro tanto*, *ib.*
 for payment of debts is excepted from the statute, *ib.*
 direction for payment of debts out of annual income, *ib.*
 portions for children of testator or beneficiary are excepted, *ib.*, 492
 what interest the parent must take, 492
 what portions are within the exception, *ib.*
 fund to be accumulated and given to children living when accumulation ceases, is not a portion, *ib.*
 nor is fund to be accumulated and given to parent for life, and then to his children, *ib.*
 to pay portions charged by another instrument, *ib.*
 portions created by the will are within the exception, 493
 legatee having vested right may stop at twenty-one, *ib.*

ACCUMULATION—*continued.*

- direction for, invalid as against charity, *ib.*
- legatee may not stop, where others have an interest in proceeds, *ib.*
- destination of excessive, *ib.*, 494
- the statute does not accelerate any gifts in the will, 494
- of non-residuary fund forms part of capital of residue, *ib.*
- excessive, of residue goes to heir or next of kin, *ib.*
- income of, whether it forms part of capital of residue, *ib.*
- title to accumulated fund given over in certain events, *ib.*
- of income during minority of tenant for life, belongs to him, 440

ACKNOWLEDGMENT,

- of signature to will, 27, 28
- of person as heir, effect of, 277

ACREAGE,

- description by, effect of, 101, 182

ACTION FOR ADMINISTRATION (see **ADMINISTRATION ACTION**).**ACTUAL**

- gift over before actual payment or receipt, 568
- meaning of actual seisin, actual possession, 593

ADDITIONAL LEGACIES (see **CUMULATIVE LEGACIES**), 122—126, 613, 617**ADDITIONS**

- made in will, rule as to, 32—34
- gift in addition to non-existing gift, 613
- made to gift in mistake as to fact, 617

ADEMPTION,

- by sale before date of will, 110
 - effect of subsequent repurchase, *ib.*, 111
 - confirmation by codicil, 111
- by subsequent dealings with property given by the will, 127—130
 - whether specific legacy must be subject to, 115
 - by the act of the testator, 127
 - by conversion through a properly constituted authority, *ib.*
 - by *vis major*, 128
 - effect of a mere transfer from trustees, *ib.*
 - a formal change, *ib.*
 - receipt by the testator of share under former will, *ib.*, 129
 - a change of security, 129
 - of fund subject to power, *ib.*
 - effect of confirmation of will on adeemed legacy, *ib.*
 - gift of a debt adeemed by receipt, *ib.*
 - whether a fresh debt will pass, *ib.*
 - of a gift of things in a house, 130
 - when removal is material, *ib.*
 - whether temporary removal will work, *ib.*
- by change of interest, 130—132
 - of lease by purchase of fee, 130, 131
 - section 23 of the Wills Act does not apply to cases of, 614
 - See **CONVERSION**, 209—219
- of legacies by subsequent advances, 631—634
 - distinguished from satisfaction, 624—625
 - testator must be *in loco parentis*, 632

ADEMPTION—*continued*.

- advance of less amount adeems *pro tanto*, *ib.*
- how the value of the advance is estimated, *ib.*
- gift of residue may be adeemed, *ib.*
- small advances for special purposes will not adeem, *ib.*
- how the presumption of, is rebutted, *ib.*, 633
- gift of residue adeemed by share of business, 633
- legacy adeemed by settlement, *ib.*
- advance to child will not adeem substitutional gift to issue, *ib.*
- advance to husband for purposes of the marriage, *ib.*
- whether ademption affects executory gifts over, *ib.*, 634
- adeemed legacy not revived by codicil, *ib.*
- advances made before the will, *ib.*
- of legacies given to strangers for a purpose, *ib.*
- by express directions (see HOTCHPOT CLAUSES), 634—637

ADMINISTRATION

- of personalty, governed by domicile, 3, 4
- of fund appointed under general power, 202
- special power, 208
- of charitable gifts, 309, 310
- of assets, 656—679; see ASSETS, CHARGE, EXONERATION, MARSHALLING, COSTS.

ADMINISTRATION ACTION,

- directions by testator to commence, 86
- effect of, on trustees' power of sale, 371, 372
- by annuitant, 409, 410
- valuation of annuity in, 412

ADMINISTRATOR,

- gift to, 292
- durante minore etate*, power of, 367
- power of sale not implied in, 373, 374
- powers of, over personalty, 377

ADVANCEMENT,

- power of, not confined to minority, 387
- what payments authorised by, *ib.*
- payment to husband, *ib.*
- payment of debts, *ib.*
- discretionary trust may give, 406
- effect of, upon vesting, 467
- in legatee's life, whether gift by will is, 628—629

ADVANCES,

- directions to bring into hotchpot, 634—637

ADVOWSON,

- devise of, effect of, 169, 170

AFTER-ACQUIRED LANDS,

- what is an intention to dispose of, before the Wills Act, 95
- when specific devise includes, 104—106
- when specific legacy includes, 114, 115
- effect of general devise on, 179

AFTER-BORN CHILDREN,

- rules as to, when illegitimate, 245, 246
- when gift to children excludes, 248

AFTER THE DEATH,

- effect of the words upon vesting, 454
- on a gift in default of issue, 583, 584

AGENT

- may sign will for testator, 24
- request to employ person as, how far binding, 85, 86
- whether he can give receipt, 376

ALIEN,

- not within Lord Kingsdown's Act, 3
- will of, 19
- may take under will, 99

ALIENATION,

- direction for cesser of life interest on, 406—408
- gift over of annuity upon, 411, 412
- gift over of life interest on, 422, 423
- direction against, effect of upon rule in Shelley's Case, 356
- restraints upon (see **CONDITION**), 504, 505, 507—510
- meaning of, 507, 509
- restraint on, when void for remoteness, 477

ALIQOT PART

- of a fund, what is a gift of, 117

ALL AND EVERY

- create joint tenancy, 328

ALLOTMENT

- of new shares, effect of, as between tenant for life and remainderman, 442

ALTERATIONS

- in will, rules as to, 32—34
- of soldier, 64
- made in mistake as to fact, 617

ALTERNATIVE CONTINGENT LIMITATIONS,

- distinguished from limitations dependent on prior limitations, 523

AMBIGUITY, 107, 108, 109, 222, 223. See EVIDENCE—DESCRIPTION.

ANATOMY,

- gift of body for purpose of, 78, 79

ANCIENT MONUMENTS

- may be devised to the state, 323

"AND," when changed into "or,"

- upon the context in a direct gift, 620
- in gifts over, 570—572
 - if A. dies under twenty-one and without issue after devise in fee, 570
 - after devise for life with remainder to children, *ib.*
 - after devise in tail, *ib.*, 571
 - gift over upon two events, one of which includes the other, 571, 572
 - gift over upon two independent events, 572

AND ALSO,

- effect of, in introducing specific gift, 119

ANIMALS,

- gifts for benefit of, 297, 298
- when not void for remoteness, 475

ANNUITIES,

- gift of long, 115
- from what time they begin to run, 154
- postponement of, to debts and legacies, 155
- arrears of, interest on, *ib.*
- gift of, charged on land with powers of distress is specific, 119
- are included in term legacies, 168
- rank with legacies for purpose of abatement, 659
- how valued for purpose of abatement, *ib.*
- characteristics of, 409—412
 - and rent-charge distinguished, 409
 - right to distrain by statute, *ib.*
 - arrears raisable by sale or mortgage, *ib.*
 - annuitant may bring action to administer, *ib.*, 410
 - charge upon realty and personalty, 410
 - rule in Shelley's case applies to rent-charge, *ib.*
 - given with words of inheritance devolve like realty, *ib.*
 - cannot be entailed, *ib.*
 - though given with words of inheritance remain personalty, *ib.*
 - charged upon realty and personalty without words of inheritance are personal estate, *ib.*
 - direction to lay out sum in purchase of, is a gift of sum, *ib.*
 - purchase annuity of given amount, *ib.*, 411
 - direction that annuitant is not to have value of annuity, 411
 - gift over on bankruptcy or alienation, *ib.*
 - gift of annuity with fund to secure it, 412
 - annuitant entitled to value in administration of deficient estate, *ib.*
- duration of, 412—416
 - whether for life or perpetual, 412—414
 - created *de novo* not affected by sect. 28 of Wills Act, 412
 - rule as to annuity given by will, 413
 - charge upon rents of freeholds, *ib.*
 - charge upon income of fund, *ib.*
 - when it is perpetual, *ib.*, 414
 - charge upon leaseholds, 414
 - direction to purchase, *ib.*
 - direction for cesser in certain events, *ib.*
 - power to appoint in fee, *ib.*
 - limitations inconsistent with a mere life interest, *ib.*
 - given for period and for object, 414—416
 - for maintenance, 414, 415
 - for education, 415
 - to trustee for his trouble, *ib.*
 - gift of, during minority of an infant, 415, 416
- whether charged on income or corpus, 416—418
 - direction to set apart a fund to fall into residue, 416
 - with gift over, 417
 - gift over of capital subject to or after payment of, 417
 - corpus treated as entire after annuitant's death, *ib.*
 - gift of surplus income of each year, 418
 - when a continuing charge on rents and profits, *ib.*
 - marshalling in favour of rent-charge, *ib.*
 - for the lives of A. and B., 420, 421
 - when the survivor takes the whole, 421, 422
 - valuation of, 659, 660

ANTICIPATION,
 gift over on, 508

ANTICIPATION, RESTRAINT UPON, 513—517
 affecting corpus, does not prevent will, 17
 effect of, upon election, 97
 of annuity, effect of, 411
 whether it can be void for remoteness, 477
 when it will be rejected, 487
 may be imposed on corpus as well as income, 514
 imposed on foreign legatee, *ib.*
 can only be attached to separate estate, *ib.*
 tenant in tail restrained may enlarge her estate, *ib.*
 effect of, on corpus of realty, 515
 no distinction between income and non-income bearing fund, *ib.*
 effect of direction to pay on, *ib.*
 where fund is to be held by trustees, *ib.*
 may be confined to reversionary interest, 516
 effect of, where accumulation is directed, *ib.*
 determines with coverture, *ib.*
 revives on future coverture, *ib.*
 may be confined to marriage with particular husband, *ib.*
 what words create, *ib.*, 517
 enforcement of judgment against income subject to, 517
 will be inserted in settlement to separate use, 602

APPOINTMENT (see Power),
 by will, not aided, 12
 under a special power with invalid condition added, raises no
 election, 91, 96
 it may, if the whole appointment is invalid, 91
 ademption of appointed fund by change of investment, 129
 whether it takes fund from donees in default in all events, 200—
 202
 class to take in default of when fixed, 262, 263
 effect of lapse on, 638—639
 to objects and non-objects, effect of, 117, 328, 644
 with invalid restrictions added, 397
 how affected by rule against perpetuities, 481, 486, 487
 may operate on accrued share, 538
 hotchpot clauses will not be implied in, 637
 of use, vests legal estate in appointee, 360

APPORTIONMENT
 of rents and periodical payments under Apportionment Act, 141—
 145
 Act does not apply to profits of a private partnership, 145
 to what companies Act applies, *ib.*
 Act applies to a bonus, *ib.*
 Act applies where an absolute is cut down to a life interest, *ib.*
 of condition, 502
 of money charged on realty and personalty, and given to charity,
 313, 314
 where two properties are sold together, 369

APPROPRIATION,
 power of, 387—389
 legatee bound by investment in consols, 387, 388
 where will specifies securities, 388

APPROPRIATION—*continued*.

- effect of Trustee Act, 388
- of share of residue, *ib.*
- effect of valid, *ib.*, 389

APPURTENANCES,

- what will pass as, 172

ARMS,

- condition of adopting coat of, 503

ARREARS

- of rents, include what, 145
- of an annuity, whether they carry interest, 155
- may be raised by mortgage or sale, 409

ART MUSEUM,

- gift to, is charitable, 296

ARTICLES,

- meaning of, 189

AS FAR AS the rules of law and equity permit,

- effect of these words on doctrine of perpetuity, 485
- whether they create an executory trust, 592, 599
- whether they carry on chattels directed not to vest in a tenant in tail dying under twenty-one, 594
- effect where the trust is clearly executory, 599

ASSENT

- of husband to wife's will, 18

ASSETS,

- order of, for payment of debts, 656—664
 1. general personal estate, 656
 - specific fund charged, *ib.*
 - residue undisposed of, *ib.*
 - legacy in lieu of share of residue which lapses, is payable out of general personal estate, *ib.*, 657
 - whether lapsed share of residue exonerates share well disposed of, 657
 2. real estate devised for payment of debts, whether descended or not, 657
 - real estate descended not charged with debts, *ib.*
 4. real estate charged with debts and devised or descended, *ib.*, 658
 5. pecuniary legacies, 658
 - whether lapsed legacy exonerates one that takes effect, 659
 - what are, for purposes of abatement, *ib.*, 660
 - priority between, 660
 - legacies and residue, 661, 662
 6. real estate devised not charged with debts and specific legacies rateably, 662, 663
 7. property appointed under a general power, 663, 664
 8. foreign land follows *lex loci*, 664
- how costs of administration are payable, 664—666
- loss of, on whom it falls, 662
- of company, apportionment on sale of, 442
- recovered, how apportioned, 448
- lost, how apportioned, *ib.*
- See APPROPRIATION.

ASSIGNS,

- effect of, used as a word of limitation, 279
- when superadded to representatives, 291
- effect of gift over on alienation, on gift to A. and her, 507, 508

AS WELL AS,

- effect of, in making gift specific, 119

AT,

- effect of, in a devise of specific lands, 102, 103
- death, effect of, 519, 530

ATTEMPT TO ASSIGN,

- effect of gift over on, 508

ATTESTING WITNESS,

- signature by, to will, 29—31
- gifts to, 99, 100

AT THE DEATH,

- gift over, when it cuts legatee down to life interest, 419, 420, 519, 520, 530, 618
- effect of, upon gift on failure of issue, 583, 584

ATTRACTION,

- doctrine of, 359, 392, 393

B.**BANK,**

- gift of property in or at, 161, 166

BANK NOTES

- will pass as money, 158

BANKRUPTCY (see ALIENATION).

- gift over on, of annuity, 411
 - of life interest, 422, 423
 - of estate in fee void, 505
 - when effectual, 507—510
 - construction of, 509, 510
- when it determines power to appoint to children, 423
- trustee in, conversion by, 219
- retainer against bankrupt legatee, 133
- of executor carrying on business, 382, 383

BASE FEE,

- how created in rent charge, 410

BASTARDS. See ILLEGITIMATE CHILDREN.**BELIEF,**

- erroneous, will not raise election, 89
- legacy given from erroneous, 617

BENEFICIAL

- power, meaning of, 205
- interest, meaning of, 461

- BENEFIT**, words of
 whether they prevent legal estate from passing, 185, 186
 superadded to executors, 390
 gifts in trust, 402
- BENEVOLENCE**,
 purposes of, are not charitable, 298, 299
- BEQUEATHED**,
 gift of property, 161, 162
- BLANKS**
 may be left in will, 32
 may not be filled up by parol evidence, 221, 222, 250
- BODY, DEAD**,
 property in, 78
- BONA VACANTIA**,
 Crown entitled to, 649, 650
- BONUS**
 on shares declared before the death, will not pass with the shares,
 144
 when apportionable, 145
 right to, as between tenant for life and remainderman, 441, 442
- BOOK-DEBTS**,
 what passes under, 163
- BORN**,
 gift to children to be born, does not exclude existing children,
 247, 248
 born, does not exclude after-born children, 248
 child en ventre, 259
 in due time, meaning of, 264
- BORN OR TO BE BORN**,
 effect of words in extending class, 260, 261, 263, 264
- BOROUGH ENGLISH LANDS**,
 devise of, to the heir of a person, 276
- BOROUGH FUND**,
 bonds charging, are not within Mortmain Act, 315
- BUILD**,
 gift to, charitable institutions, 317—320
- BUSINESS**,
 meaning of, 166, 167
 gift of share of, 132
 cannot be carried on without authority, 382
 what capital may be employed in, *ib.*
 effect of direction to carry on, *ib.*, 383, 384
 losses in, whether tenant for life bears, 441
 effect of condition of forfeiture if legatee ceases to carry on, 503
 whether gift of share in, adeems gift of residue, 633

C.

CALLS

upon shares, when payable by specific legatee, 135

CAPACITY (see **TESTAMENTARY**)**CAPITA, PER** (see **DISTRIBUTION**), 251—254

gift to several families goes to children, 275

CAPITAL AND INCOME,

effect of direction to pay debts out of income, 491

income of accumulations released by statute is income of residue,
494

as between tenant for life and remainderman, 440—442, 446—449
(See **TENANT FOR LIFE AND REMAINDERMAN**)

CASH,

meaning of, 161

CESSER

proviso for, of life interest, 422

CESTUI QUE TRUST

estate of, is commensurate with that of trustee, 340, 341

CHANGE

of security, as effecting ademption, 129

of interest of testator,

acceptance of new lease, 130

purchase of equity of redemption, 131

effect of Wills Act, *ib.*, 132

purchase of reversion, 131

gift of share of business, 132

CHANGING WORDS,

"or" will not be changed into "and" in a condition precedent,
620

(See **OR**), 343, 539, 540

"fourth" changed into "fifth," 620

change of "and" into "or" in gifts over, 570—572, 620

change of "or" into "and," 572, 573

CHARACTER,

gift to legatee filling certain, 227—237

CHARGE

of legacies on realty before Wills Act, when it includes legacy by
unattested codicil, 54

legacy with charge on land is not specific, 118

on specific gift when adeemed, 127

upon devisees, effect of in passing fee, 339

of annuity on corpus, gives right to raise arrears by sale, 409

freeholds and residue gives right to administer, 409,
410

freeholds as affecting its duration, 413

income of fund as affecting its duration, 413

leaseholds as affecting its duration, 414

CHARGE—continued.

- on land, vesting of, 458, 459
- reduplication of, under referential gift, 595, 596
- power to, when inserted in settlement, 602
- will not fail by revocation of devise, subject to charge, 616
 - death of devisee, 641
- will by ademption of gift, subject to the, *ib.*
- devise subject to, which fails, 645, 646
- (See INCUMBRANCES)

CHARGE OF DEBTS,

- effect of, in excluding trust estates from general words, 185, 186
 - in excluding property subject to a special power from general words, 205, 206
 - on estates of trustees, 362
- whether it gives executors a power of sale, 372—375
- what debts it includes, 669, 670
 - debts subsisting at the death, 669
 - damages accrued after the death, *ib.*
 - direction to pay debts subsisting at a particular time, *ib.*
 - of another, *ib.*
 - deduct debts due from a legatee, *ib.*
 - testamentary expenses, what are, 665
 - funeral and other expenses, *ib.*
- upon what property it takes effect, 670
 - charge of debts and legacies charges all the testator's property, 670
 - legacies merely, is confined to residuary lands, *ib.*
- how created, 670—675
 - devise of rentcharge, 670
 - charge on realty in case personalty insufficient, *ib.*
 - when sufficiency ascertained, *ib.*, 671
 - general direction to pay debts, 671
 - whether it charges realty left to descend, *ib.*
 - subsequent charge of certain debts on particular lands, *ib.*
 - subsequent charge of all debts on personalty, *ib.*
 - certain lands, *ib.*
 - exception of certain lands out of subsequent charge, *ib.*
 - express charge not controlled by partial charges, *ib.*
 - effect of a direction to executors to pay debts, 672
 - where no realty is devised to them, *ib.*
 - land devised to them is charged, *ib.*
 - whether legacies to be paid by executor are charged on lands devised to him, *ib.*
 - it is immaterial whether the devise is for life or in tail, *ib.*
 - unequal devises to executors, *ib.*
 - gift of real and personal estate after payment of debts charges both, *ib.*, 673
 - where real and personal estate are given together as residue, *ib.*
 - where whole personalty is given in certain shares, *ib.*
 - direction that legacy shall sink into residue, *ib.*, 674
- power to raise debts out of rents and profits charges corpus, 674, 675
 - direction to pay out of annual rents and profits, 674

CHARGE OF LEGACIES

- on land gives devisee power of sale, 374, 375
- (See CHARGE OF DEBTS)

CHARITY, gifts to, 295—324

defined, 295—303

gifts for educational and religious purposes, 295

for advancement of science, *ib.*for promotion of particular doctrines, *ib.*, 296

for benefit of locality, 296

gift to voluntary society, *ib.*, 297

for benefit of animals, 297, 298

to repair a church, 298

to build or repair a tomb, *ib.*for foreign charity, *ib.*for objects of liberality or benevolence, *ib.*, 299

for private charity, 299

in favour of Dissenters, Jews, and Roman Catholics, *ib.*for monastic orders, *ib.*, 300

for release of poachers, 300

superstitious uses, *ib.*for masses, *ib.*for masses in Ireland, *ib.*, 301

for relief of aged, impotent, and poor, 301

for widows and orphans, *ib.*

to poor relations, whether charitable, 302, 303

in respect of an office, 303

to poor clergymen to be selected by a trustee, *ib.*to trustees of a charity without more, *ib.*doctrine of *cy pres*, 303—309, 321

when there is a general charitable intent, 303, 304

whether particular charitable gifts fall into residue given to charity, 304

gift to a particular charity may lapse, *ib.*, 305

misdescription of a charitable society, 305, see 220

gift for definite charitable object may fail, *ib.*inquiry directed as to the possibility of an object, *ib.*, 30

gift upon a remote event is void, 306

gift for charitable or other indefinite objects, *ib.*where part must be applied to charity, *ib.*, 307

failure of particular gift may involve failure of gift of surplus, 307, 308

gift contrary to policy of statute, 308

increase in value of rents and profits given to, *ib.*, 309

administration of, 309, 310

gift to charitable institution is administered by the institution, 309

trustees administered by court, *ib.*, 310

foreign trustees, 310

where a discretion left to the trustee, *ib.*when fund retained in court, *ib.*

restrictions on gifts to charity, 310—324

effect of Mortmain and Charitable Uses Act, 1891, 310, 311

Act applies to gifts in remainder, 311

effect of Mortmain and Charitable Uses Act, 1888, *ib.*, 312

effect of the Statute of Mortmain, 312

what is an interest in land within the Act, 312—317

money to arise from sale of land, 312

purchase money for land contracted to be sold, *ib.*

money to arise from sale of land under a prior instrument, 312, 313

crops, leaseholds, 313

legal and equitable mortgages and mortgages of leaseholds, *ib.*

CHARITY—*continued.*

- mortgages of real and personal property when apportioned, *ib.*, 314
- arrears of interest due on a mortgage, 314
- rent accrued since the death on land contracted to be sold, *ib.*
- judgment debt charged on realty, *ib.*
- covenant to leave money by will is void as regards realty, *ib.*
- shares in public companies, when within the statute, *ib.*, 315
- debentures, mortgage debentures and debenture stock of railways, 315
- waterworks mortgage, *ib.*
- corporation bonds, *ib.*, 316
- charge on specific tolls, 316
- charge on police rates, *ib.*
- charge on poor rates, *ib.*
- arrears of rent due at the death, 317
- apportioned rent, *ib.*
- royalty on minerals, tenant's fixtures, *ib.*
- legacy duty on charitable legacy must be paid out of pure personalty, 312
- what is personalty to be laid out in land, 317—321
 - money to be invested on real or mortgage security, 317
 - money ultimately to be invested in land, *ib.*
 - where the trustees have an option, *ib.*
 - gift to pay off a mortgage debt, *ib.*
 - improve, enlarge, or repair a charitable institution, *ib.*
 - build, *ib.*, 318
 - discretion to trustees to build or not, 318
 - trustees to select charities, *ib.*
 - gift to establish a charity, *ib.*
 - provide a charity, *ib.*
 - support or found, *ib.*
 - endow, 319
- evidence of intention that land was not intended to be purchased, *ib.*, 320
- gift to charity existing for purchase of land, 320
 - foreign charity, *ib.*, 321
 - by colonial testator, 321
- exceptions from statute, 321—324
 - what universities and colleges exempt, 321
 - whether a devise to a college carries legal estate, *ib.*
 - charities empowered to hold lands, *ib.*, 322
 - redemption of land tax, 322
 - Church Building Acts, *ib.*, 323
 - endowment of districts, 323
 - public parks, schools, and museums, *ib.*
 - ancient monuments, *ib.*
 - science and art department, *ib.*
 - secret trust for, bad, 324
 - whether legal estate passes, *ib.*
- property given to, application of rule against remoteness to, 476
- whether accumulation directed in favour of, may be stopped, 493
- marshalling in favour of, 668, 669

CHATTEL INTEREST,

- when trustees take, 362, 363

CHATELS,

- in a house, bequest of, 130, 165
- meaning of, 177, 178
- bequest of, by reference to limitations of realty, 592—596
- effect of revocation of trusts of realty, 616
- executory trust to settle, 599
- who entitled to, in default of next of kin, 650
- whether there can be remainder in, 518
- effect of separate use on husband's rights over wife's, 512

CHILD,

- when used as a word of limitation, 345, 346

CHILD EN VENTRE,

- is considered as born for purposes of benefit, 259
- but for no other purpose, *ib.*
- whether illegitimate, can acquire reputation of parentage, 245
- effect of, upon rule in *Wild's Case*, 346

CHILDREN,

- gifts to illegitimate (see **ILLEGITIMATE CHILDREN**), 238—246
 - legitimate, 247—254
 - whether children must be legitimate according to English law, 238, 239
 - includes children by a first and second marriage, 247
 - does not include grandchildren, *ib.*
 - words of futurity will not exclude existing children, *ib.*, 248
 - posthumous children, 248
 - words referring to existing children will not exclude after-born, *ib.*
 - express gift to a child will not exclude him from a gift to children, *ib.*
 - gift to a class for life and then to their children, when some members of the class are dead at the date of the will, *ib.*, 249
 - gift to the children of A. and B., 249
 - a certain number of children when there are more, 249, 250
 - when the class is ascertained (see **CLASS WHEN ASCERTAINED**), 255—264
- gifts to parent and, whether they take successively or jointly, 325—328 (see **PARENT AND CHILDREN**)
- used as a word of limitation (see *Wild's Case*, rule in), 345—347
- gifts to, who survive their parents (see **VESTING**), 469—473
- portions for, when excepted from Thellusson Act, 491—493
- gifts over upon death without, 574
 - without leaving or having, 574, 575
 - unmarried and without, 569, 570
- intention to benefit, how carried out where trust is executory, 600

CHOSSES IN ACTION,

- whether they pass as things in a locality, 165, 166

CHURCH,

- gift to repair, is charitable, 298
- build, 322

CLAIMED,

- condition forfeiting legacy if not, 496, 497

CLASS,

- gift to, right to income, 147, 148
 - one of a, 232
- devise to a, in tail, whether they take jointly or successively, 325
- gifts to a contingent, and upon a contingency, 455, 461
- gifts to a, when the youngest attains twenty-one, 468
- gift to, when void for remoteness, 482, 483
- doctrine of lapse in case of gifts to a, 643
- what is a gift to a, 644
- gift to persons "before named," *ib.*
 - five daughters of A., *ib.*
 - executors "herein-named," 645
 - a class and an individual, *ib.*

CLASS WHEN ASCERTAINED,

- when the gift is to younger children, 234
 - gift is to younger children upon a contingency, *ib.*, 235
 - eldest son is to be ascertained, 235, 236
- as regards personalty, 255—259
 - immediate gift, 255
 - effect of gift over, *ib.*
 - no children at death, *ib.*
 - future gifts, *ib.*, 256
 - life interest determinable on bankruptcy, 256
 - imperfect limitations, *ib.*
 - gift of reversionary property, *ib.*
 - to be paid at twenty-one, 257
 - void for perpetuity, *ib.*, 258
 - of maintenance out of vested shares, 258
 - division when the youngest attains twenty-one, *ib.*
 - gift of fixed sum to each member of a class, *ib.*
 - after life interest to children who attain twenty-one, *ib.*, 259
 - child *en ventre* admitted, 259
 - conceived before but born after marriage, *ib.*
- as regards gifts of income, 259
- as regards real estate, 260—262
 - immediate devises, 260
 - children born and to be born, *ib.*
 - contingent remainder, *ib.*, 261
 - executory devise, 262
- class to take in default of appointment, 262, 263
 - where the only gift is through the power, 262, 263
 - power to appoint by deed or will, 263
- effect of words of futurity, 263, 264
- in the case of gifts to issue, 269, 270
 - when the gift is substitutional, 269
 - in remainder, 270
- in the case of gifts to relations, 272, 273, 287
 - the class is ascertained at the death of the propositus, 272
 - gift to such relations as survive tenant for life, *ib.*
 - where the tenant for life is sole next of kin, *ib.*
 - where there is a power to appoint to relations, *ib.*, 273
- in the case of gifts to next of kin or heirs, 286—289
 - next of kin are ascertainable at the death of the ancestor, 286, 287
 - same rules apply to realty, personalty, and a mixed fund, 286
 - when the tenant for life is sole next of kin, *ib.*

CLASS WHEN ASCERTAINED—*continued.*

- exception of persons who could only be next of kin if the tenant for life were dead, 206
- same rules apply in the case of executory gifts, 287
- when the gift is to nearest of kin of my family or relations, *ib.*
- effect of words of futurity upon the rule, 287, 288
- gift to next of kin of deceased person, 288, 289
- in the case of substitutional gifts, 547, 548
- gifts to survivors (see SURVIVORS), 557—561
- to take, may be altered by acceleration, 647

CLEAR SUM,

- gift of, whether free from legacy duty, 156

CLERICAL ERRORS,

- in will may be corrected, 23

CODICIL,

- revocation of will by, 42, 43, 614—619
- revocation of, by revocation of will, 43, 44
- revival of will by, 57—60

COLLATERAL HEIR,

- devise to, in default of heirs, creates an estate tail, 336, 337

COLLATERAL MORTGAGE,

- effect of, as regards exoneration, 142

COLLEGE,

- devise to, 321

COLONIES,

- Mortmain Act does not apply to, 321

COMMON, TENANCY IN,

- what creates (see JOINT TENANCY), 332—334

COMPANY,

- incorporated by Act of Parliament, what, 379
- how profits of, to be apportioned, 441

COMPENSATION,

- for determination of lease, goes to legatee of lease, 217

COMPOUND EVENT,

- when it may be split, 481, 482

COMPROMISE,

- power to, 377, 378

CONCURRENT AND SUCCESSIVE INTERESTS, 325—328

CONDITION,

- of original applies to substituted legacy, 125, 126
- attached to charitable gift, effect of, 310
- distinguished from election, 89
 - from trust, 401, 450
 - from limitation, 450
- devise subject to a proviso, *ib.*, 451

CONDITION—*continued*.

- estate of trustees to preserve, 451
- general test of precedent, *ib.*
- requiring time for performance, *ib.*
- involving consideration, *ib.*
- precedent must be fulfilled whether impossible, impolitic, or illegal, *ib.*, 452
 - involving physical impossibility void in personalty, 452
 - discharged by testator, *ib.*
 - contra bonos mores* void in personalty, *ib.* See VESTING, 452—474
 - when governed by doctrine of *in terrorem*, 500, 501
- subsequent, 495—517
 - impossible, impolitic, or illegal, are ineffectual, 495
 - whether a gift over is material, *ib.*
 - when void for uncertainty, *ib.*, 594
 - requiring consent of several persons becomes impossible by death of any, 496
 - consent of guardians, *ib.*
 - not performed through ignorance takes effect, *ib.*
 - unless the devisee is heir, *ib.*
 - forfeiting a legacy if not claimed within a given time, *ib.*
 - what amounts to a claim, *ib.*, 497
 - effectual without gift over in realty, 497
 - how far personalty follows the same rules, *ib.*
 - test of validity of, *ib.*
 - must be clearly defined, *ib.*
 - encouraging separation of husband and wife, *ib.*
 - not to dispute a will is valid, 498
 - institute legal proceedings, *ib.*
 - interfere in management, *ib.*
 - to require bonds not to marry, *ib.*
 - rules for computing time, *ib.*
- in restraint of marriage, 498—502
 - applies to lawful marriage, 498
 - imposed on devisees for life or in fee is valid, *ib.*
 - devisee in tail, *ib.*
 - bad in case of personalty, *ib.*
 - same rule applies to a mixed fund, 499
 - and to legacy out of proceeds of sale of land, *ib.*
 - limitation till marriage is good, *ib.*
 - in partial restraint of marriage is good, *ib.*
 - restraining widow or widower from marrying, *ib.*
 - requiring marriage with consent, *ib.*
 - restraining marriage before a certain age, *ib.*
 - with particular class, *ib.*
- doctrine of, *in terrorem*, 500, 501
 - to what conditions it applies, 500
 - conditions in partial restraint of marriage, *ib.*
 - not to dispute a will, *ib.*
 - effect of a gift over, *ib.*
 - whether the doctrine applies to conditions precedent, *ib.*, 501
- waiver of, by the testator, 501
- second marriage with consent fulfils condition requiring consent, *ib.*, 502
- performance of, requiring consent, 502
- consent of several persons, *ib.*
 - of guardian, *ib.*
- what formalities are required, *ib.*
- apportionment of condition, *ib.*

CONDITION—*continued.*

- requiring a release within a given time, 502, 503
- of forfeiture, if legatee ceases to carry on business, 503
- name and arms clause, *ib.*
- of residence, *ib.*
- repugnant, 503—517
 - general restraints upon alienation after devise in fee are bad, 504
 - partial restraints upon alienation, *ib.*
 - restraint limited in time, *ib.*
 - upon alienation by mortgage, *ib.*
 - effect of Settled Land Act on, *ib.*, 505
 - direction not to raise rents, 505
 - gift over of absolute interest in personalty on alienation, *ib.*
 - on alienation before period of distribution, *ib.*
 - on bankruptcy, *ib.*
 - if legatee dies intestate, *ib.*
 - if legatee does not dispose of his interest, 506
 - if prior gift is void, *ib.*
 - condition not to bar entail, *ib.*
 - estate tail cannot be determined in part, *ib.*
 - directed to cease as if tenant in tail were dead, *ib.*
 - absolute interest directed to cease as if donee were dead, *ib.*
 - enjoyment cannot be postponed beyond twenty-one, *ib.*, 507
 - gift over on alienation, 507—510
 - legatee not aware of condition, 507
 - disclaimer of charge, *ib.*
 - meaning of term alienation, *ib.*, 509
 - gift to A. and her assigns, 507
 - gift over if legatee should “do or suffer,” “do or permit,” 508
 - gift over if property becomes “payable to or vested in another,” *ib.*
 - gift over on attempt to assign or charge, *ib.*
 - on anticipation, *ib.*
 - on taking in execution, *ib.*
 - insolvency, meaning of, 509
 - gift over on bankruptcy, includes subsisting one, *ib.*
 - effect of annulment of bankruptcy, *ib.*, 510
 - bankruptcy during prior life estate, 510
 - penal servitude, *ib.*
- creation and incidents of separate use, 510—514 (see **SEPARATE USE**)
- creation and incidents of restraint on anticipation, 514—517 (see **ANTICIPATION, RESTRAINT ON**)
- of paying a legacy, devise upon, charges land, 673

CONFIRMATION (see **REPUBLICATION**)

- of will does not revive a deemed legacy, 111, 129

CONSENT,

- to exercise power of sale,
 - by infant, 368
 - by tenant for life after alienation, *ib.*
 - bankruptcy, *ib.*
 - whether survivor of class can give, 369
- of persons in possession to sale of reversion, *ib.*
- to investment, must be given previously, 379
- to exercise of power of advancement, 387
- conditions requiring (see **CONDITION**), 495, 496, 500—502
- gift over, on marriage without, 536

- CONSISTING IN,
effect of words, in restraining large words, 187
- CONSTRUCTIVE TRUST,
whether it passes under general words, 186
- CONSUMABLE ARTICLES
cannot be given in succession, 518
- CONTENTS,
gift of contents of desk, what it includes, 166
- CONTEST WILL,
condition not to, 498, 500
- CONTINGENCY,
may be transmissible, 457
gift upon, must be literally fulfilled, 456
importing no more than determination of prior estates, *ib.*
not imported into gift to a single child, 461
reflected back into constitution of original class, 462
gift to a class upon a contingency when imported into the constitution of the class, 471, 472
where it runs through a series of limitations, 524, 525
where events which happen include named events, 527—529
gift over upon death treated as, 529—531
coupled with, 531—536
attaching to original not extended to substitutional legatees, 545—547
- CONTINGENT GIFT,
when it carries income, 145—148
interest on, 152, 153
- CONTINGENT POWER,
execution of, 200
- CONTINGENT REMAINDERS (see VESTING), 452—458
incidents of, 260, 261, 520—522
trustees to preserve, what estate they take, 361
not destroyed by rule in *Shelley's Case*, 348
where estate can take effect as, will not be construed as executory devise, 482, 520
- CONTINGENT WILL, 12
- CONTRACT FOR SALE,
when it effects conversion, 215, 216
effect of on devise of trust estates, 186
- CONTRIBUTORY MORTGAGE,
not within power to invest on mortgage, 379
- CONVERSION, 209—219 (see also ADEMPMENT)
what effects, 209—211
direction to consider land personalty, 209
direction to divide, *ib.*
power to convert, *ib.*
conversion upon request, 210
absolute discretion in trustees, *ib.*
discretion controlled by general intention, *ib.*, 211
by subsequent limitation, 211
whether directed for all purposes of the will, 211—213
direction that realty should form part of personalty, 211

CONVERSION—*continued.*

- gift of residue of proceeds of sale, 211, 212
- whether residuary bequest passes proceeds of sale of realty, 212
- direction to convert at a certain time and divide, *ib.*
- absolute direction to sell, *ib.*
- mixed fund to be converted, *ib.*, 213
- when the personalty and proceeds of sale of realty are treated as separate funds, 213
- who is entitled to property to be converted but undisposed of, *ib.*, 214
- heir at law and next of kin are entitled, *ib.*
- direction that proceeds of sale of realty are to be part of the personal estate, 214
- declaration that the proceeds of the sale shall not lapse for the benefit of the heir, *ib.*
- surplus of sale of realty directed to be personal estate and given to the executors, *ib.*
- money to be laid out in land results for next of kin, *ib.*
- how the heir and next of kin take property directed to be converted, 214, 215
- where the object of the conversion wholly fails, 214
- where it fails partially, *ib.*, 215
- where realty is directed to be converted and charged with debts, 215
- at what period the failure of the purposes of the conversion is to be determined, *ib.*
- personalty to be laid out in land goes to next of kin as land, *ib.*
- as between tenant for life and remainderman, 442—446
 - where there is a trust to convert, 442, 443
 - specific enjoyment till conversion, 442
 - where there is no trust to convert, 443—446
 - wasting property must be converted, 443
 - reversionary property, *ib.*
 - specific enjoyment, what entitles the tenant for life to, *ib.*
 - discretion to convert, *ib.*, 444
 - power to retain, 444
- gift of enumerated things, *ib.*, 445
 - a pure residue, 445
 - rents and profits when there are only leaseholds, *ib.*
- property specifically given at death of tenant for life, *ib.*, 446
- trust to convert at death of the tenant for life, 446
- power to sell with consent of tenant for life, *ib.*
- debts must in all cases be got in, *ib.*
- by events extraneous to the will, 215—219
 - effect of a contract for sale, 215, 216
 - notice to treat, 216
 - option to purchase, 216, 217
 - redemption money for rent-charge, 217
 - compensation for lease, *ib.*
 - right to intermediate profits, *ib.*, 218
 - right to interest on purchase money, 218
 - contract to purchase realty, *ib.*
 - contract to build a house, *ib.*
 - sale under statutory powers, *ib.*
 - conversion by trustee in bankruptcy, 219
 - sale under a decree, *ib.*
 - conversion of property of lunatic, *ib.*
 - conversion into fee simple of renewable leaseholds, *ib.*
- trust for, when it should be exercised, 377

CONVICT. See FELON.

COPYHOLDS,

- devise of, since Wills Act, 74
- effect of general devise on, 181
- freebench in, barred by general devise, *ib.*
- devise of estate tail in, 341
- not within the Statute of Uses, 359
- direction to sell, effect of, 366
- contingent remainders in, 521
- who entitled in case of escheat, 650

CORPORATION,

- whether it can take by devise, 98
- bonds, whether within Mortmain Act, 315, 316

CORPSE,

- property in, 78

CORPUS OR INCOME,

- charge of annuity on, 216—218
- when power to raise money out of rents and profits gives charge on corpus, 674, 675
- See CAPITAL AND INCOME; TENANT FOR LIFE AND REMAINDERMAN.

COSTS,

- clause enabling trustee to charge, 389

COSTS OF ADMINISTRATION,

- order of assets for payment of, 664—666
- not debts within meaning of charge of debts, 664
- testamentary expenses include costs of action, 665
- funeral expenses, *ib.*
- costs of special case, *ib.*
- personal estate primarily liable, *ib.*
- additional costs of administering realty payable out of realty, *ib.*
- what included in, *ib.*, 666
- mixed residue bears, rateably, 666
- liability of unappointed funds, *ib.*
- how far descended estates are liable, *ib.*
- probate and estate duty, *ib.*

COURT,

- ademption by order of, 127
- conversion by order of, 218
- power of, to charge infant's property for maintenance, 386, 387
- when it controls discretion of trustees as to maintenance, 385
- when it controls discretionary trust for benefit of legatee, 406

COUSINS,

- meaning of, 266, 267

COVENANT,

- not to revoke will, 13
- to leave property by will, *ib.*
- voluntary, to leave money by will to charity, 314
- to settle, property preserved from lapse not within, 642
- for renewal in lease under power, 380

CRANWORTH'S, LORD, ACT,

effect of, in allowing maintenance, 149, 153, 384, 385

CREDITOR,

attesting will, 27

right of, to be paid out of intestate's estate raises no election, 91

where business carried on after death, 383, 384

legacy to, whether satisfaction of debt, 629—631

bequests to, whether subject to lapse, 639, 640

CREMATION,

whether legal, 79

CROPS,

when within Mortmain Act, 313

right of tenant for life to, 431

CROSS-REMAINDERS,

implication of (see IMPLICATION), 610—613

when the class to take under is ascertained, 270

CROWN,

within Locke King's Acts, 138

is entitled, in default of next of kin, to chattels, 650

when it is entitled to residue not attempted to be disposed of, 652

(see ESCHEAT)

CUMULATIVE AND SUBSTITUTIONAL LEGACIES, 122—126

legacies of equal amount by the same instrument, 122

of unequal amount, *ib.*

by different instruments, *ib.*, 123

when the instruments are substitutional, 123

or mere repetitions, 124

evidence that the legacies were meant to be substitutional, 122

legacies given from same motive, 125

liability of, to the incidents of original gift, *ib.*, 126

CURTESY,

effect of separate use upon, 511, 512

husband of devisee entitled to, where devise saved from lapse by
sect. 33...642

CUSTOM,

evidence of, admissible, 101

CY PRÈS,

doctrine of, 487—489

is a rule of construction, 487

applies to execution of a power by will, *ib.*

the parent will take an estate tail when the property will go in
the course marked out, *ib.*

may be applied to some of a class and to part of the property
included in a devise, *ib.*

applies though the will gives joint estates tail to children, *ib.*, 488

does not apply where the property would not go in the course
marked out by the testator, 488

whether it applies where the intention is to create life estates for
ever, *ib.*

does not apply where estates in fee are given to children, *ib.*, 489
to personalty or to a mixed fund, 489

in case of gifts to charity (see CHARITY), 303—309, 321

D.

DEAD,

- condition determining estate tail as if tenant in tail were, 506
- absolute interest as if donee were, *ib.*

DEATH,

- when the will speaks from the, 104—106, 114, 164
- before date of will of original legatees, effect of, on substitutional gift (see SUBSTITUTION), 542—545
- before a given age, gift over upon, 528, 529
- in case of, gift over (see GIFT OVER), 529—531
- coupled with contingency, gift over on (see GIFT OVER), 531—536
- before vesting, gift over upon (see VESTING), 562, 563
- payment, gift over upon (see PAYMENT), 563—567
- receipt, gift over upon (see RECEIPT), 567, 568

DEATH WITHOUT CHILDREN,

- gift over upon, when children will be read issue, 574
- does not give children any interest by implication, 608, 609

DEATH WITHOUT HAVING ANY CHILD,

- gift over upon, construction of, 575

DEATH WITHOUT ISSUE,

- gift over upon,
 - influence of, upon the prior estate,
 - in the case of realty,
 - effect of, on prior devise in fee, 337
 - on prior devise for life, 603, 604
 - on the rule in *Shelley's Case*, 350, 355, 356
 - in the case of personalty,
 - on a bequest to A. for life, 391
 - to A. for life, then to the heir of his body, *ib.*
 - to A. and his issue, 392, 393
 - to A. for life and then to his issue, 393
 - provision of Conveyancing Act as to, 531
 - when the defeasibility will be limited within a certain period (see GIFTS OVER), 531—536
 - construction of, 576—587
 - at what time the failure must take place where it is confined within a certain time, 576
 - where the devise over is to persons then living, *ib.*
 - effect of sect. 29 of Wills Act on, *ib.*, 577
 - death without issue male is within the Act, 577
 - the section does not apply to heirs of the body, *ib.*
 - in what cases the referential construction of, will be adopted,
 - in the case of realty, 577—580
 - where the gift over is in default of such issue,
 - after limitations in tail, 577
 - to children in fee, *ib.*
 - intention that children were to take in tail, *ib.*, 578
 - after limitations for life, 578
 - giving first son a life interest and other sons estates tail, *ib.*
 - the word such is inaccurately used, *ib.*, 579

DEATH WITHOUT ISSUE—continued.

in the case of realty,

where the gift over is in default of issue merely, after limitations to issue in fee or in tail, 579

to some of the issue, *ib.*, 580

where the failure of issue is restricted to the ancestor's death, 580

after a power to appoint to issue, *ib.*

where the limitations to issue are contingent, *ib.*

after limitations to issue without words of inheritance before the Wills Act, *ib.*

in the case of personalty, 580—582

after gifts to children absolutely, 580, 581

when the gifts to children are contingent, 581

construction assisted by other limitations, *ib.*

where all the issue are provided for, *ib.*, 582

after gift to parent and children jointly, 582

gifts over before the Wills Act, 582—587

where they import an indefinite failure, 582

where the failure of issue will be restricted,

where the issue is the testator's own issue, *ib.*

where the ulterior limitations are for payment of debts, *ib.*, 583

where the gift over is upon death under twenty-one without issue, 583

gift over on, at, or after the death of the parent, *ib.*

direction to pay a sum of money on the decease of the parent, 584

gift over to persons "then living," *ib.*

class ascertainable upon some collateral event, 585

survivors, *ib.*, 586

named person, 586

intention to confer personal enjoyment, *ib.*

where the subsequent estates are all for life, *ib.*

where the estate devised is *pur autre vie*, *ib.*

where the estate devised is a reversion limited in failure of certain lines of issue, *ib.*, 587

DEATH WITHOUT LEAVING OR HAVING ISSUE,

effect of, 574, 575

DEBENTURES, DEBENTURE STOCK,

whether within Mortmain Act, 315, 316

DEBTOR,

gift to, whether subject to lapse, 639

DEBTS,

gift in satisfaction of, raises election, 88

of a third person, release of, may raise election, 90

gift of a particular, is specific, 116

gift of, when adeemed, 129

owing from legatee, right to retain, 132—134

are profits of year when paid, 144, 440

interest on legacy in satisfaction of, 151

bequest of, meaning of, 163, 164

book, 163, 173

general direction to pay, executes general power, 199

whether it executes it *pro tanto* only, 201

DEBTS—continued.

- direction to pay, effect of, on estates of trustees, 359, 362 (see TRUSTEES, ESTATES OF)
- charge of, effect of, on estates of trustees, 359, 362
 - whether it gives executors a power of sale, 372—375
- contracted by executor, 377, 382
- payment of, authorized by power of advancement, 387
- gift to pay non-existing, 405
- accumulation for payment of, whether void for perpetuity, 479
 - excepted from Thellusson Act, 491
- devise after payment of, is vested, 523
- order of assets for payment of (see ASSETS), 656—664
- charge of, what creates (see CHARGE), 670—675
- what debts are within a charge of, 669, 670
- satisfaction of, by legacies (see SATISFACTION), 629—631

DECIDE QUESTIONS,

- power of trustees to, 389

DECLARATIONS OF TESTATOR (see EVIDENCE)**DECREE,**

- sale under, effect of, upon conversion, 219

DEDUCTIONS,

- free from, effect of gift, 155, 156

DEED,

- when it may take effect as a will, 10, 11

DEFAULT OF,

- devise in, persons to take under prior limitations when it is a remainder, 522

DEFAULT OF HEIRS,

- devise in, to collateral heir, 336, 337

DEFAULT OF ISSUE,

- (See DEATH WITHOUT ISSUE)

DEFEASIBILITY,

- period of, when it ceases in gifts to survivors, 554—557 (see SURVIVORS)
- when restricted in gifts over upon death coupled with contingency (see GIFTS OVER), 531—536

DELEGATION,

- of testamentary power, 12, 21

DELUSION,

- effect of, on testamentary capacity, 14

DEMONSTRATIVE LEGACIES,

- what are, 112
- gift of money out of stock, 114, 115
- charge upon a particular fund, 114, 117
- gift of money invested in a particular way, 114, 116
- direction to pay out of a particular fund, 118

DEPENDENT RELATIVE REVOCATION, 37—41, 616**DEPARTMENT OF SCIENCE AND ART,**

- may take land by devise, 323

DEPOSIT WITH FIRM,
power to, 379

DESCENDANTS,
meaning of, 270

DESCRIPTION,
of things, 101—111
 what evidence admissible, 101, 102
 terms of art, foreign words, nicknames, 101
 evidence of custom, *ib.*, 102
 word with ordinary meaning, 102
 devise of estate by name, *ib.*
 of or at A., *ib.*
 patent ambiguity, symbols, *ib.*
 original will may be looked at, *ib.*
 property exactly answering description alone passes, 102—104
 reference to occupation, 103
 to title by which lands derived, *ib.*
 to county, *ib.*
 lands at or near A., *ib.*
 property in a street, *ib.*, 104
 held under lease, 104
 how far will speaks from death, *ib.*, 105, 106
 exception from devise, 105
 use of present tense, 106
 use of "now," *ib.*
 effect of republication, *ib.*, 107
 part inaccurate, 107
 inconsistency, 108
 name followed by occupation, *ib.*
 locality, *ib.*
 devise of freshhold farm, *ib.*
 leading words of, what are, 108, 109
 nothing to answer, 109
 specific bequests, *ib.*
 some out of more, *ib.*
 gift of what legatee selects, 110
 increase of value passes unless excluded, *ib.*
 inaccuracy in gift of stock, *ib.*
 thing sold before date of will, *ib.*, 111
 thing never belonging to testator, 111
 thing sold where similar thing has been bought, *ib.*
 inaccurate description of charity, 305
of persons, 220—227
 what evidence admissible to explain, 220
 person fully answering description, *ib.*
 by Christian name or initials, *ib.*
 persons unknown to testator, 221
 nicknames, *ib.*
 patent ambiguity, *ib.*
 blanks not supplied, *ib.*, 222
 inaccurate description, 222
 name accurate, description inaccurate, 223
 name inaccurate, description accurate, *ib.*
 equivocation, *ib.*, 224, 225
 equivocation on face of will, 224
 explained by will, *ib.*
 nephews, whom it includes, 225
 some one to answer name, some one description, 225

DESCRIPTION—*continued.*

- of persons,
 - A., second son of B., where A. first son, 225, 226
 - elaborate description prevails, 226
 - description supplying motive, *ib.*
 - gifts to persons filling a character, 227—237, 484
 - whether the person to take under particular, may depend on some future act of the testator, 64

DEVISABLE,

- what is, 73—78
 - copyholds, 74
 - land liable to escheat, *ib.*
 - estate *pur autre vie* to a man and his heirs, *ib.*, 75
 - title by possession, 75
 - right to sue in testator's name, *ib.*
 - property-held in joint tenancy is not, *ib.*
 - trusts, 77, 78

DEVISE

- of land is specific, though it be residuary, 117
 - on trust for sale and division is specific, *ib.*
 - by general words, 179—186 (see GENERAL DEVISE)
- when class ascertained in case of, 260—262

DEVISEE,

- who may be, 98—100
 - corporations, 98
 - aliens, 99
 - felons, *ib.*
 - attesting witnesses, *ib.*, 100

DEVOLUTION

- of trust and mortgage estates, 184—186
- of trust for sale, 368

DEVOLVE,

- effect of word, on distribution *per stirpes*, 252

DIE WITHOUT, &c.,

- (See DEATH WITHOUT, &c.)

DIRECTION

- to convert, what amounts to, 209—211
- to pay debts, 199, 201 (see DEBTS)
 - effect of, in creating a charge upon realty, 671—674
- to buy annuity, 410—412, 414

DISCLAIMER

- by trustee divests legal estate, 360
- of power, 366, 367

DISCRETION

- of trustees,
 - to convert, when controlled by context, 210, 211
 - effect of, upon specific enjoyment, 443, 444
 - to apply to charity and other purposes, 306, 307, 318
 - to distribute to charity not interfered with, 310
 - to sell, 371, 372
 - to convert, how it should be exercised, 377
 - to maintain, 385, 386

DISCRETION—*continued*.

- of trustees to apply money for legatee, 405
- to purchase annuity, 411
- no implication where not exercised, 609
- to apply interest for maintenance, effect of upon vesting, 465, 466

DISCRETIONARY TRUSTS, 405—408

- gift to trustees to dispose of as they think fit, 405, 406
- wide discretion given for benefit of individual, 406
- discretion equivalent to power of advancement, *ib.*
- trust to apply all or part of income for benefit of A., *ib.*
- income given to trustees upon alienation by, or bankruptcy of tenant for life, 406—408
 - where income is to be applied for benefit of one object, 407
 - discretion to apply income for one or more, *ib.*
 - trust for benefit of class, *ib.*
 - power of selection among class, *ib.*, 408
- duration of discretion, 408

DISPOSE OF,

- gift over, of what legatee does not, 420, 519

DISPOSING POWER,

- what, 205, 206

DISPOSITION,

- by testator of property not his own (see ELECTION)
- powers of management and, distinguished, 602
- power of, superadded to an absolute interest, 395, 396
 - a life interest, *ib.*, 519, 520

DISPUTE WILL,

- condition not to, 496, 500

DISSENTERS,

- position of, as regards charitable gifts, 299

DISTRIBUTION,

- per capita* and *per stirpes*, 251—254
- gift to children of several parents goes *per capita*, 251
 - several and their issue, *ib.*
 - surviving children and their issue, *ib.*
- effect of a direction that parents and children are to be classed together, *ib.*
- the word "respective" has a distributive force, 252
- force of the word devolve, *ib.*
- effect of a direction to distribute *per stirpes*, *ib.*
- whether the distribution will be *per stirpes* throughout, *ib.*, 253
- gift to parents for life and then to their children, 253, 254, 391—394
- substitutional gifts, 254
- how the stirpes are to be ascertained, *ib.*
- descendants take *per capita*, 270
- relations take *per capita*, 271
- gift to the families of A. and B. goes to children of A. and B. *per capita*, 275
- whether in gifts to next of kin the statute fixes the proportions as well as the persons, 282, 283
- when gift over limited to period of, 531—536

- DISTRIBUTION, WORDS OF,**
superadded in case of realty,
 in devise to A. and the heirs of his body, 342
 A. and his issue, 344
 A. for life, remainder to his heirs, 349, 350
 A. for life, remainder to his issue, 354, 355
superadded in case of personalty,
 bequest to A. for life, remainder to his heirs, 392
- DISTRIBUTIONS, STATUTE OF,**
effect of a reference to, 282, 283
whether it regulates the proportions as well as the persons, *ib.*
- DISTRICT FUND,**
bonds charging, not within Mortmain Act, 315
- DIVESTING, 525—538 (see GIFTS OVER)**
- DIVIDE,**
direction to, does not give power of sale, 364
- DIVIDENDS,**
apportionment of, between specific and residuary legatee, 144
 between tenant for life and remainderman, 440,
 441, 442
- DIVISION,**
gift over on death before division of estate, 567
- DIVORCE,**
effect of, on gift to wife, 228, 229
 on gift to husband and wife, 230
 on gift to unmarried person, 231
 on tenancy by entireties, 335
- DOMESTIC ANIMALS,**
gifts for benefit of, are charitable, 297, 298
 when not void for remoteness, 475
- DOMESTIC SERVANTS,**
meaning of, 228
- DOMICILE,**
will of personalty governed by, 3, 4
rules for ascertaining, 4—9
of origin, 4, 9
of children, 4, 5
of lunatic, 5
of married woman, *ib.*
of soldier, 5, 6
of choice, 6—9
when it governs legitimacy of children, 238, 239
- DOWER,**
what is an intention to dispose of land free from, before the Wills
 Act, 93—95
legacy in lieu of, what it includes, 94
whether legacy in lieu of, bars claim under intestacy, 648
- DUPLICATE WILL,**
effect of destruction of, 46

DURATION,

- of power of sale, 370, 371
- of trust for sale, 371
- of discretionary trust, 408
- of annuities, 412—416

DUTY (see LEGACY DUTY), 155—157**E.****EASEMENT,**

- what words will pass an, 173
- right of way, *ib.*

EDUCATION,

- of children, directions as to, 85
- gift for purposes of, 295
- annuity for maintenance and, 415

EFFECTS,

- meaning of, 164, 165, 177

EJUSDEM GENERIS,

- doctrine of, 187—191, 602

ELDER AND YOUNGER,

- meaning of, 233—237
- prima facie* refers to birth, 233
- may mean only child, *ib.*
- eldest son of his father, *ib.*, 234
- in what cases elder son means son taking the estate, 235—237
- younger children may mean children not provided for, 235, 236
- at what time the class is to be ascertained, 235, 236
- under what title a son must take the family estate in order to be excluded, 236, 237

ELDEST SON,

- gift to A. and his, 336
- when used as a word of limitation, 345

ELECTION, 87—97

- when it arises, 87
- compensation by person electing is a charge on his interest, *ib.*
- where legatee cannot give effect to instrument, *ib.*
- legatee must elect for or against the whole instrument, 88
- gift in lieu of dower limits election to that, *ib.*
- gift in satisfaction of a debt raises election, *ib.*
- only arises between title *dehors* and under the will, *ib.*
- does not arise where one of two gifts is onerous, *ib.*
- nor between two clauses of same will, 89
- distinguished from conditions, *ib.*
- to raise, testator must dispose of something not his own, *ib.*
- appointment under non-existing power, *ib.*
- erroneous belief not sufficient, *ib.*
- election by married woman, 90
- release of debt, when it raises, *ib.*
- in respect of what property of the legatee it arises, *ib.*, 91
- at what time the title of the legatee must have accrued, 90
- does not arise when the testator appoints under a special power, and superadds illegal conditions, 91

ELECTION—*continued*.

- it does if the whole appointment is invalid, 91
- property subject to special power given to strangers, *ib.*
- what is a disposition by the testator of property not his own, 92
- general words limited to testator's own property, *ib.*
- when the testator is entitled in moieties, *ib.*
- when the testator is entitled subject to a charge, 93
 - to the reversion, *ib.*
- dower, intention to dispose of lands free from, 93—95
- disposition of after-acquired lands before the Wills Act, 95
- when the heir is put to election, *ib.*, 96
- next of kin of married woman, when put to, 96
- to raise, there must be a gift of free disposable property, *ib.*, 97
- arises in cases of satisfaction, 625
- where heir or next of kin are excluded by the testator, 649

EMBLEMENTS,

- when devisee takes, 166
- right of tenant for life as to, 431

EMPLOYÉES,

- gifts to, 227

ENDOW

- a charity, gift to, 319

"ENJOYED,"

- gift of house as enjoyed by A., 173

ENJOYMENT,

- postponement of, does not affect vesting, 454
- legatee having vested interest is entitled to, at twenty-one, 506, 507
- specific, by tenant for life (see **CONVERSION**), 442—446

ENTAIL,

- effect of direction to, 598

ENTIRETIES,

- tenancy by, how created, 334, 335

"ENTITLED,"

- meaning of, in clause of exclusion, 235
- gift over upon death before becoming, 563, 565
- meaning of, in shifting clauses, 588

ENTRIES

- of advances in testator's ledger when binding on legatee, 634, 635

ENUMERATION,

- of particulars, effect of
 - in making gift specific, 119
 - in restricting large words, 187—191
 - in giving tenant for life specific enjoyment, 444, 445

EN VENTRE,

- child (see **CHILD EN VENTRE**), 245, 259, 346

EQUITY

- to settlement, not out of property held by entireties, 334

EQUIVOCATION,

- when it arises, 223—225
 - when two persons equally answer same description, 223
 - when part of a description applies equally to two persons and the rest to no one, *ib.*
 - father and son may both equally answer description, *ib.*
 - immaterial that will on the face discloses an, 224
 - does not arise between two antecedents in the same will, *ib.*
 - may be explained by the will itself, *ib.*
 - whether it arises between nephews proper and wife's nephews, *ib.*
 - does not arise where part of a description applies to one person, part to another, 225

ERASURES

- in will, 32—34
- revoking effect of, 38—40

ESCHEAT,

- will of lands liable to, 74
- whether it reunites freeholds with manor, 169
- who entitled in case of, 649, 650
- effect of Intestates Estates Act, 1884...649, 650

ESTABLISH,

- gift to, a charity, 318

ESTATE,

- at A. and of A., what passes under devise of, 102, 103
- when it will pass realty, 175, 176
- devise of, when it executed a general power over realty, 196
- when it will pass the fee, 338

ESTATE AND POWER,

- distinguished, 365, 395, 396

ESTATE FOR LIFE,

- in consumable property, 518
- gift at the death of the legatee, 519, 530
- in annuity what creates, 412, 413
- for life and life of heir, 420
 - of A. and B., duration of, 420, 421

ESTATE *PUR AUTRE VIE*,

- limited in tail, whether devisable, 74, 75
- whether fee passes without words of limitation, 337
- rule in *Shelley's Case* applies to, 347
- during lives of A. and B., 419, 420
- executory gift over of, valid, 520
- contingent remainder in, 521
- devise on failure of issue of an, 586
- descent of, 650, 651

ESTATE TAIL, 341—347

- heirs explained by the context as equivalent to heirs of the body, 336
- devise to several and their heirs successively, *ib.*
- effect of gift over in default of heirs to a collateral heir, *ib.*, 337
- effect of gift over in default of issue on prior devise in fee, 337

ESTATE TAIL—*continued*.

- words of limitations proper to pass, 341—344
 - devise of copyholds to A. and heirs of his body, 341
 - heirs of the body or issue, *ib.*
 - heirs male, heirs lawfully begotten, 342
 - effect of words of limitation superadded, *ib.*
 - effect of words of distribution superadded, *ib.*
 - “the elder son to be preferred to the younger,” *ib.*
 - the heirs of the body must be the heirs of the ancestor, *ib.*
 - heirs of the body of the wife and heirs on the body of the wife begotten, *ib.*, 343
 - limitation to heirs of body of persons who may marry, 343
 - devise to A. or the heirs of his body, *ib.*
 - devise to a man or his heirs, *ib.*
 - when heirs equivalent to heirs of the body, *ib.*
 - devise to A. and his issue passes an estate tail, 344
 - effect of words of distribution, *ib.*
 - devise to several and their issue and their heirs as tenants in common, *ib.*
 - by the operation of the rule in *Wild's Case* (see *WILD'S CASE*), 346, 347
 - by the operation of the rule in *Shelley's Case* (see *SHELLEY'S CASE*), 347—356
 - by implication (see *IMPLICATION*), 603, 604
 - by the *cy pres* doctrine (see *CY PRES*), 487, 488
- words creating an, in realty give absolute interest in personalty, 390, 392
- limitations after, not void for remoteness, 478
- gift over of personalty after estate tail, 519
- cannot be created in an annuity, 410
- condition against marriage annexed to, void, 498
 - barring void, 506
- conditions to determine, *ib.*
- (See *TENANT IN TAIL*)

ESTATES OF TRUSTEES (see *TRUSTEES*), 357—363*ET CÆTERA*,

- what it passes, 187

EVERY,

- effect of in a direct gift, 325

EVIDENCE,

- of testamentary intention, 11
- declaration as to execution not admissible, 69
- as to what constitutes will, 32
 - alterations, *ib.*
- how far admissible where words are obliterated, 34, 39
- in cases of revocation, 38, 46
- where there are two testamentary instruments, 41
- of contents of lost will, 47
- of trust when admitted, 64
- of secret trust, *ib.*, 65
- not admissible to raise election, 89
- of testator's meaning, what admitted, 101, 102
- where testator gives what he has not, 110
- to show that legacies are cumulative, 122
- that two instruments duplicates, 124

EVIDENCE—*continued*.

- of meaning of description of persons, 220
 - nicknames, initials, 221
- patent ambiguity, *ib.*
- blanks, *ib.*, 222
- in cases of equivocation, 223, 224
 - where A. answers to name and B. to description, 225
- to show that testator was aware of a death, 240
- of intention to benefit certain children, 250
- where charitable gift implies purchase of land, 319
- to rebut satisfaction, 624
- entries after date of will, 634
- that advances intended to be a gift, 635
- on question of executor's title to residue, 651, 653, 654, 655

EXCEPTION,

- of property out of devise, what it includes, 105
 - out of devise in fee, passes fee, 340
 - from a residue, for particular purpose, 193, 194

EXCHANGE,

- before date of will of thing specifically given, effect of, 110, 111
- power of, whether inserted in settlement, 602

EXCLUSION,

- clauses of, 235, 236
- from being next of kin, 284, 285, 648, 649

EXECUTION,

- of powers, 195—208 (see **GENERAL POWERS** ; **SPECIAL POWERS**)

EXECUTORS,

- attesting will, 27
- special, of parts of property, 80
- delegation of power to appoint, *ib.*
- married woman may be executrix, *ib.*
- appointed by several instruments, *ib.*
- according to tenor, 81
- appointment of, whether it executes general power, 199
- used as a word of purchase, 292—294
- gift to A. or his, does not go to next of kin, 292, 641
- gift to, in respect of office, 292, 530, 531
- what is an acceptance of the office, 292, 293
- when the executor is entitled, though he does not act, 293
- interest on legacy to, 150
- duration of annuity to, for his trouble, 415
- gift of residue to, whether beneficial or in trust, 294
- whether gift to, is a gift to a class, 645
- used as a word of limitation of realty, 336
 - of personalty, 390
- when they take beneficially, *ib.*
 - they take fee of real estate, 178, 357
 - lapsed legacy goes to, 638, 640, 641
- when they take residue, undisposed of, 651—655
 - effect of Lord St. Leonards' Act, 651
 - contrary intention, *ib.*
 - Act does not apply where residue is expressly given, 652
 - where there are no next of kin, *ib.*
 - they do not take lapsed or void legacies, *ib.*
 - nor residue given on trust, *ib.*

EXECUTORS—*continued*.

- nor when they are treated as trustees, 652, 653
- nor where there is an intention to dispose of the residue not carried out, 653
- legacy to a sole executor makes him trustee, *ib.*
- unless the legacy can be accounted for as an exception out of a larger gift, 654
- equal legacies to several executors make them trustees, *ib.*
- effect of unequal legacies, *ib.*
- legacy to one for his trouble converts all into trustees, *ib.*
- executors appointed for special reasons take on trust, 655
- effect of direction to, to sell lands, 365, 366
 - copyholds, 366
- acting executors may sell, *ib.*
- whether power of sale survives, *ib.*
 - executor of, can sell, 367
 - power is given *virtute officii*, *ib.*
- power of, over personalty, 376, 377
- power to compromise, 377, 378
- lease by, 380
- power to carry on business, 382—384
- power to appropriate legacies, 387—389
- when they have implied power of sale over real estate, 372—375
 - land directed to be sold to pay debts, 372
 - to create a mixed fund for division, *ib.*
 - direction to sell and divide proceeds, *ib.*
 - effect of Lord St. Leonards' Act, *ib.*, 373
 - devise to trustees where debts and legacies are charged on land, *ib.*
 - beneficial devise to one of executors, *ib.*, 374
 - similar devise to person not executor, 374
 - charge of specific debts or legacies, *ib.*
 - general charge of legacies, *ib.*, 375
- consent of those who renounce not required, 502

EXECUTORY DEVISE,

- distinguished from contingent remainder, 261, 520—522
- how the class to take under, is fixed, 262
- when void for remoteness, 475

EXECUTORY INTERESTS,

- and remainders distinguished, 520—522
- (See GIFTS OVER, DIVESTING.)

EXECUTORY TRUST, 597—602

- direction to secure for A. and his family, 273, 274
- for A. and her children, how executed, 328
- whether children take jointly or in common, 333
- what is an, 597
- direction to purchase lands to be held on trusts of another instrument is not, *ib.*
- distinction between marriage articles and wills, *ib.*, 598
- how far rule in *Shelley's Case* applies to, 598
- direction to settle on A. and the heirs of his body, *ib.*
 - A. for life, remainder to his heirs, *ib.*
- effect of gift over, if first taker dies without issue, *ib.*
- direction to make a strict entail, *ib.*
 - to settle property to go with a title, 599
- effect of words as far as rules of law permit, *ib.*
- direction to settle upon marriage, *ib.*

EXECUTORY TRUST—*continued.*

- how executed, 600
- in what cases tenant for life will be unimpeachable for waste, 601
- settlement to separate use will be with restraint on anticipation, 602
- what powers will be inserted in execution of, *ib.*

EXONERATION,

- of specific legacies, 134, 135
 - from liabilities created by the testator, 134
 - incident to the thing, *ib.*, 135
- of mortgaged property, 135—143
 - devise of land "subject to" the mortgage, 136
 - effect of charge of the mortgage on the land in distinct sentence, 136
 - Locke King's Act, *ib.*, 137
 - the amending Acts, 137, 138
 - Crown taking in default of next of kin is within the Act, 138
 - heir by descent from person dying after December 31, 1851, not entitled to exoneration, *ib.*
 - copyholds within the act, *ib.*
 - land on trust for sale not within the Act, *ib.*
 - leaseholds whether within Acts, *ib.*
 - apportionment of mortgage, 139
 - mortgages by deposit are within the Act, *ib.*
 - general charge is not, *ib.*
 - nor covenant to pay a mortgage on stranger's land, *ib.*
 - judgment where land has been delivered in execution is, *ib.*
 - lien on lands purchased by testator is, *ib.*
 - effect of general direction to pay debts, 140, 141
 - direction to pay debts out of personal estate, *ib.*
 - effect of charge of trade debts, 141
 - direction to pay mortgages out of an insufficient fund, 142
 - what proportion of mortgage mortgaged lands bear, *ib.*
 - mortgaged land devised to several, *ib.*
 - collateral mortgages, *ib.*
 - successive mortgages, *ib.*, 143
 - charge as between land given by deed and devised, 143
 - of personalty from payment of debts, 675—679
 - by express words, 675
 - whether gift over of the fund is necessary, *ib.*
 - whether personalty exonerated is exonerated in favour of next of kin, *ib.*
 - on the general context, 676
 - charge of debts on realty will not effect, *ib.*
 - whether devise on condition of paying debts will effect, *ib.*
 - express charge of certain debts on personalty, *ib.*
 - gift of realty and personalty on trust to pay debts, *ib.*
 - to convert and pay debts, *ib.*, 677
 - discretion of trustees to sell realty, 677
 - realty to be sold and fall into personalty, *ib.*
 - income of realty and personalty charged with debts, *ib.*
 - gift of residue of real and personal estate does not exonerate personalty, *ib.*
 - charge of testamentary expenses on realty, where personalty is specifically given, *ib.*, 678

EXONERATION—*continued.*

- legacies charged on land where personalty specifically given, 678
- effect of specific gift of personalty to executor, *ib.*
- of charge of particular debts on realty, *ib.*, 679
- gift of land after payment of debts, 679

F.**FAILURE,**

- of prior gift through want of persons to take, where the gift over is on failure of those persons in a particular way, 528, 529
- of prior gift by lapse, will not make invalid gift over, *valid*, 506, 519

FAILURE OF ISSUE. (See **DEATH WITHOUT ISSUE**)**FALSA DEMONSTRATIO NON NOCET,**

- application of the maxim (see **DESCRIPTION**), 107—111, 223—225

FAMILY,

- meaning of, 273—275
- in devises, 273
- direction to secure to, *ib.*, 274
- in bequests means children, 274
- whether illegitimate child included, *ib.*
- when it means next of kin, *ib.*
- may include husband or wife, *ib.*
- power to appoint to, *ib.*, 275
- when gift to, will be void for uncertainty, 275
- gift to several families goes *per capita*, *ib.*
- direction to distribute rents among, 302, 303
- precatory trust for, 400

FARM,

- will pass a leasehold as well as a freehold part, 170

FARMING STOCK,

- meaning of, 166

FATHER. (See **PARENT**)

- not entitled to income available for maintenance of child, 385
- when entitled to be recouped sums spent in maintenance, 386

FEE SIMPLE,

- what words will pass, 336—341
 - devise to A. and his heirs, 336
 - A. and his lawful heirs, *ib.*
 - A. and his executors, *ib.*
 - when heirs equal to heirs of body, *ib.*
 - gift over in default of heirs to collateral heir, *ib.*, 337
 - gift over in default of issue, 337
- when it will pass without words of limitation, 337—341
 - in wills before the Wills Act,
 - words property or estate, 338
 - recital of intention to dispose of all his estate, *ib.*
 - words moiety, part, or share, *ib.*
 - charge upon the devisee, 339
 - discretionary trust imposed on devisee, *ib.*
 - charge upon the land generally, *ib.*

FEE SIMPLE—*continued*.

- express estate for life not enlarged by charge, 339
- gift over upon death of devisee under twenty-one, *ib.*
 - under twenty-one without issue, 340
 - of the parent without children, *ib.*
- devise of rents and profits or income, *ib.*
- devise of specific sum, *ib.*
- exception of property out of a devise in fee, carries fee, *ib.*
- devise to trustee and his heirs in trust for A., *ib.*, 341
- since the Wills Act, 341
- contrary intention within the Act, *ib.*
- by the operation of the rule in *Shelley's Case* (see **SHELLEY'S CASE**), 347—356
- when trustees take (see **TRUSTEES**), 357—363
- conditional, how created, 410
- implication of (see **IMPLICATION**), 607—610

FELON,

- will of, whether valid, 19, 20
- gifts to, 99
- wife of, feme sole for testamentary purposes, 18

FINES FOR RENEWAL,

- apportionment of, between successive interests, 437, 438, 439
- belong to tenant for life, 440

FIRST

- son, gift to a, whether it refers to order of birth, 232, 233

FIRST AND SECOND COUSINS,

- meaning of, 266, 267

FIRST HEIRS MALE,

- when used as words of limitation, 353

FIXTURES,

- tenant's are not within Mortmain Act, 317
- as between tenant for life and remainderman, 431

FOREIGN BONDS,

- meaning of, 164

FOREIGN CHARITY,

- gift to, 298, 310
- whether court will settle a scheme for, 310
- bequest to, of proceeds of sale of land in England, 320
- of money, 321

FOREIGN HEIR,

- when put to election, 96

FOREIGN LAND,

- gift to buy, not subject to rule against perpetuities, 476
- order of, in administration of assets, 664

FOREIGN PROBATE,

- effect of, 69, 70

- FOREIGN WILL,**
when entitled to probate, 68, 70, 71
- FORFEITURE,**
abolition of, 20, 99
- FOUND,**
gift to, whether it implies building, 318
- FRAUD,**
words inserted by, omitted from probate, 23
probate conclusive as to, 23, 72
of executor in assuming office, disentitles him to legacy, 293
assumption of character by, 227
- FREE-BENCH,**
what is an intention to dispose of land free from, 93—95
whether barred by a general devise, 181
- “FREEHOLD LANDS,”**
devise of, 108
when it passes leaseholds, 170, 171
- FREEHOLDS,**
effect of general devise on (see **GENERAL WORDS**), 179
- FRIENDLY SOCIETY,**
gift to, not charitable, 296
- FRIENDS,**
gifts to, 271, 275
- FROM**
and after, effect of, upon vesting, 454
A. downwards includes A., 248
- FUND,**
legacy of part of, whether specific, 117
rules as to income of, when given to a class, 147, 148
bequeathed to purchase annuity, when annuitant is entitled to,
410, 411
where annuity is secured on, annuitant is not entitled to value of
annuity, 412
- FUNDS,**
gift of money in the, 161 162
- FUNERAL EXPENSES**
of married woman, are payable by her estate, 16
and other expenses, what, 665
- FURNITURE,**
in a house, gift of, when adeemed, 130
what passes under, 164
- FUTURE DEVISE,**
does not carry intermediate rents, 145, 146
- FUTURE TIME,**
trustee for sale cannot contract to sell at, 369

FUTURITY, words of,

- not necessary to include future illegitimate children, 246
- effect of, in excluding children already born, 247
 - in construing devise as executory, 261, 262
 - on ascertaining the class to take, 263, 264
 - in ascertaining the class of next of kin, 287, 288

G.**GAP**

- in limitations, effect of, 458

GAVELKIND LANDS,

- devise of, to the heir of a person, 276
- devise of, to A. and his heir, 336

GENERAL DEVISE,

- effect of, 179—186
 1. on freeholds prior to the Wills Act, 179
 - effect of the Wills Act, *ib.*
 - force of the word "now," 106
 2. on reversions, 179—181
 - devise of lands not settled, 180
 - where the limitations are inapplicable to the reversion, *ib.*, 181
 3. on leaseholds for lives, 181
 4. on copyholds, *ib.*
 5. on leaseholds for years, 182, 183
 - intention not to pass them, 183
 6. on beneficial interest in a mortgage, 184
 7. on trust and mortgage estates, *ib.*, 185, 186
 8. on powers, 195—202 (see **GENERAL POWERS**)

GENERAL LEGACY,

- what is, 112—115
- interest on, 148—154 (see **INTEREST**)

GENERAL POWERS,

- execution of, 195—202
 - before the Wills Act, 195—197
 - effect of general devise, 195, 196
 - residuary bequest, 196
 - vested in married woman, 197
 - after the Wills Act, 197—202
 - effect of sect. 27 of the Wills Act, 197, 198
 - what is general power within the sect., 198
 - what is contrary intention within the sect., 198, 199
 - effect of direction to pay debts, 199
 - where power is created after will, *ib.*, 200
 - how far appointment takes fund from donees in default of appointment, 200—202
 - administration of appointed fund, 202
 - power of revocation and new appointment, *ib.*

GIFTS OVER,

- in default of heirs to collateral heir, effect of, on prior devise in fee, 336, 337
- in default of issue (see **DEATH WITHOUT ISSUE**)
- effect of, in passing the fee under prior devise, 339, 340
 - in cutting down absolute interest, 419, 420

GIFTS OVER—*continued.*

- of annuity, after death of survivor, 421, 422
- on marriage or bankruptcy, 457, 458
- on death after gift till marriage, 458
- upon death before vesting upon contingent devise, 454, 455
 - upon meaning of the word vested, 460
 - upon contingent bequests, 467—468
- effect of, upon gift to children who survive their parents, 471
- if none of the class survive the contingency, upon which the gift to the class takes effect, 471, 472
- of property given to charity, 476
- effect of, where condition is impossible, 495
- whether necessary to make condition subsequent effectual, 497
- effect of, upon doctrine of conditions *in terrorem*, 500, 501
- effect of, after absolute gift, 503—507 (see *CONDITION*)
 - on bankruptcy or alienation, 507—510 (see *CONDITION*)
- what cannot be the subject of, 518—520
 - remainder in chattels, 518
 - consumable articles, *ib.*
 - absolute interests cannot be given in succession, *ib.*, 519
 - do not become valid by lapse, 519
 - of so much as legatee does not dispose of, *ib.*, see 399
 - of what remains after payment of legatee's debts, 519
 - after life interest with power of disposition, *ib.*, 520
 - of estate *pur autre vie*, to man and his heirs, *ib.*
- take effect if the events happen though gift over is void, or donees over may be unable to take, 525
 - to survivors, do not divest prior gift if no survivors, *ib.*, 526
 - of shares of parents to children, do not divest prior gift if no children, 526
 - in certain events of a life interest, destroy prior interest in fee only so far, *ib.*
- construction of,
 - in different events to different persons, where both events happen, *ib.*
 - if A. dies in testator's lifetime, where both die at once, *ib.*, 527
 - when the events which happen include the events upon which the gift over is limited to take effect, 527, 528
- in the event of a legatee dying under twenty-one, 528
 - where the gift is to a class, *ib.*, 529
- upon death, treated as a contingent event, 529—531
 - in case of death of A., 529, 530
 - at the death of A., 530
 - after a life interest, *ib.*
 - where the gift is to executors for their trouble, *ib.*, 531
 - whether same rules apply to realty, 531
- upon death coupled with a contingency, 531—536
 - upon death without issue, not confined to death before the testator, 531
 - whether the gift is immediate or future, 532
 - intention to limit the period of defeasibility, *ib.*
 - gift over to survivors, *ib.*
 - where donees over take through trust which determines, *ib.*, 533
 - where all dispositions refer to period of distribution, 533
 - legatee to have control at a certain time, *ib.*
 - ulterior gifts over only to take effect within a given time, 534
 - gifts over in several events, one of which must happen, *ib.*
 - intention to give indefeasible interests, *ib.*, 535

GIFTS OVER—*continued*.

- effect of, after contingent gift, where donees over are children, 535
- of share legatee would have taken, *ib.*
- ultimate gift over restricted by prior gifts, *ib.*
- upon marriage without consent restricted to twenty-one, 536
- of accrued shares, 536—538 (see ACCRUER)
- substitutional (see SUBSTITUTION), 539—548
- to survivors (see SURVIVORS), 549—561
- upon death before vesting (see VESTING), 562, 563
 - payment (see PAYMENT), 563—567
 - receipt (see RECEIPT), 567, 568
 - sale completed, 569
 - execution of trusts of will, *ib.*
- unmarried and without issue, 569, 570 (see UN-MARRIED)
- without children, 574
 - leaving or having issue, 574, 575
 - issue (see DEATH WITHOUT ISSUE), 576—587

GOODWILL,

- bequest of, 166, 167

GRANDCHILDREN,

- not included in gifts to children, 247
- will not include great grandchildren, 267

GRAVE,

- gift to repair, 298

GROUND RENTS,

- pass reversion, 171

GUARDIAN,

- testamentary under 12 Car. II. c. 24...82—84
- infant cannot appoint, 83
- of illegitimate children, *ib.*, 84
- by what words appointed, 84
- under Guardianship of Infants Act, 1886...84, 85
- appointment by stranger, 97
- when allowed sums spent in maintenance, 386

H.

HALF BLOOD,

- admitted as next of kin, 281

HAVING

- children, construction of gift over upon death without, 574, 575
- issue, gift over upon death without, before the Wills Act, 582—587

HEIR,

- must be legitimate by English law, 239
- when put to election, 95
- limitation to the, of the tenant for life, 353
- next or first, *ib.*
- where the heir will take by purchase, *ib.*, 354
- limitation to the heir for life, 354
- devise to A. for life and life of his heir, 420
- acknowledgment of person as, 277
- title of, to accumulations released by statute, 494
- when entitled to rents under operation of shifting clause, 590

HEIR—continued.

takes undisposed-of interests in realty to be converted, 213, 214
 how he takes property directed to be converted, 214, 215
 gift to, after A.'s death gives A. a life estate, 604, 605
 title of, to realty undisposed of, 648
 directions excluding, effect of, *ib.*, 214
 gift to A. or his, whether subject to lapse, 641
 resulting trust in favour of (see **RESULTING TRUSTS**), 645—647
 who entitled in default of, 649, 650
 See **HEIRS**.

HEIRLOOMS,

bequest of personalty as, 592, 594
 executory trust of personalty to go as, 599

HEIRS,

- I. Meaning of, as a word of purchase, 276—281
 1. as regards realty, 276—279
 - devise of Borough English or Gavelkind lands, 276
 - when it means heir apparent or presumptive, *ib.*, 277
 - co-heirs take as joint tenants, 277
 - acknowledgment of a person as heir, *ib.*
 - devise to heirs of a particular name, *ib.*
 - whether the heir male must trace his descent through males, *ib.*, 278
 - ex parte maternā*, 278
 - heirs may mean heirs of the body, 343
 2. bequests of personalty to, 279—281
 - primū facie* means heir at law, 279, 280
 - bequest to A. for life, then to his heirs, 280
 - when it means next of kin, *ib.*
 - when used as equivalent to executors, *ib.*
 - when used to denote substitution, *ib.*
 - substitutional bequests to heirs, *ib.*, 281
 - when it means issue, 281
 - when heirs means next of kin, the statute fixes the proportions as well as the persons, *ib.*
 - bequest to heirs or next of kin, *ib.*
 - precatory trust for, 400
 3. when the class is to be ascertained (see **CLASS**), 286—289
- II. used as a word of limitation, 336, 337
 1. in the case of realty, see **FEE SIMPLE**, what words will pass, 336, 337
 - when the ancestor takes a life interest, 347—356
 - (See **SHELLEY'S CASE**, rule in).
 2. bequests of personalty, 390, 391
 - gift to A. and his heirs, 390
 - for life, and then to his heirs, 391
 - of annuity to A. and his heirs, 410

HEIRS LAWFULLY BEGOTTEN,

devise to A. and his, creates a tail, 342; see 336

HEIRS MALE,

devise to A. and his, creates a tail, 342
 devise to, 277, 278, 286

HEIRS OF THE BODY,

- I. meaning of, when used as a word of purchase, 276—279
 - heirs of the body of a particular name, 277
 - rule in *Mandeville's Case*, 278, 279

HEIRS OF THE BODY—continued.

- when heirs of the body means children, 279
- bequest of personalty to, 281
- II. when used as a word of limitation, 341—344
 1. in the case of realty (see ESTATE TAIL)
 - when explained by the testator to mean children, 352, 353
 2. in the case of personalty, 390, 391
 - gift to A. and the heirs of his body, 390
 - gift to A. for life, remainder to heirs of his body, 391
 - intention to create a succession of estates, *ib.*
 - words of distribution superadded, 392
 - where realty and personalty are given together, *ib.*
 - gift of annuity to A. and the heirs of his body, gives A. fee simple conditional, 410
 - gift over in default of, when they import an indefinite failure, 576, 577, 582—587

HEREIN, HEREBY,

- whether limited to will or codicil, in which the word occurs, 155, 156

HOTCHPOT CLAUSES,

- construction of, 628, 629
- directions to deduct advances from shares of legatees, 634—637
 - effect of recital as to amount of advance, 634, 635
 - sum not payable till after death not deducted, 635
 - effect of bankruptcy of legatee after advance, *ib.*
 - when clause ceases to operate, 636
 - whether it applies to lapsed share, *ib.*
 - interest on advances, when to be allowed, *ib.*
- implication of, under powers, 637
 - appointment "as and for her share," *ib.*
 - in lieu of all claims, *ib.*
 - clause of accruer, *ib.*

HOUSE,

- or messuage, meaning of, 171, 172
- gift of things in, 130, 165, 172, 190, 191
- materials of, when blown down, belong to tenant for life, 424

HOUSEHOLD,

- gift of household goods, 165
- household servants, who are, 228

HUSBAND,

- gift to, 229
- and wife, gifts to, 230, 231
- when included in family, 274
- will not take as next of kin by statute, 282
- and wife when tenants by entireties, 334, 335
 - when estate tail vests in, 342, 343
- effect of separate use on rights of, 511, 512
- intention to benefit, how carried out where trust is executory, 600

I.**IGNORANCE**

- of condition no excuse, 496

ILLEGITIMATE CHILDREN, 238—246

- guardians of, 83, 84
- not included under children, 238
- when law of domicile of parent applies, *ib.*, 239
- in what cases they may take, 239
- when there is no possibility of legitimate children, *ib.*
- what is sufficient evidence of intention to include illegitimate children, 241—244
- legitimate and illegitimate children can take together under the same description, 244
- description with reference to paternity, *ib.*
- child *en ventre* at date of will, *ib.*, 245
- future illegitimate children can take, 245, 246
- whether express words of futurity are necessary, 246
- reference to fact of paternity, *ib.*
- illegitimate children born after testator's death cannot take, *ib.*
- son included in gift to family, 274

IMMOVEABLES,

- will of, by what law governed, 1

IMPEACHMENT OF WASTE, 423—431 (see WASTE)

- when tenant for life without, under executory trust, 601, 602

IMPLICATION, 603—613

- class to take by, from power, how fixed, 262, 263
- of survivorship between annuitants, 420—422
- of estates tail, 603, 604
 - by gift over in default of issue after prior devise indefinitely for life or in fee, 391, 603
 - where the failure of issue might constructively be limited, 603
 - gift over in default of issue of person taking nothing under the will, *ib.*
 - an estate is implied in remainder, *ib.*
 - as between father and son an estate tail is implied in the father, 347, 604
- of life estates in the case of realty, 604, 605
 - devise to heir at law after death of A. gives A. a life estate, 604
 - devise to stranger at death of A. raises no implication, *ib.*
 - devisee over must be heir at the time of the devise, *ib.*
 - devise at death of A. to one of several co-heiresses, *ib.*
 - to heir and others, *ib.*
 - whether express devise to A. bars implication, *ib.*, 605
 - distributive construction of gift at death of A., 605
 - mere postponement of vesting raises no implication, *ib.*
 - effect of a residuary devise, *ib.*
- of life interests in personalty, 605—607
 - gift of personalty to next of kin at death of A., 605, 606
 - life interest implied in marriage settlement, 606
 - intention to give life interest, *ib.*
 - effect of residuary bequest, *ib.*
 - gift if A. dies under twenty-one to B. raises no implication, 607
- of absolute interests, 607—610
 - devise to A. till twenty-one, and if he dies under twenty-one, over, 607
 - gift to trustees in trust for A. till twenty-one, *ib.*
 - general intention that devisee was to take absolutely, *ib.*

IMPLICATION—*continued*.

- gift to A. till twenty-one for himself and another, 608
 - A. absolutely, and if he dies without children, over, *ib.*
 - A. for life, and if he dies without children, over, *ib.*, 609
 - A. to dispose of at his death among a class, 609
- of interest under power where power not exercised, 609, 610
 - bare power to appoint to A., 609
 - power to select some of a class, *ib.*
 - large discretion not exercised, *ib.*
 - power in nature of trust, *ib.*
 - power to tenant for life, *ib.*, 610
- of cross-remainders, 610—613
 - devise to several in tail, followed by gift in default of such issue in tail, 610
 - immaterial whether the gift is limited as a remainder or reversion, *ib.*
 - gift over in default of issue living at ancestors' deaths, 611
 - whether cross-remainders limited in certain events, bar implication, *ib.*
 - cross-remainders implied between persons taking different interests, *ib.*
 - tenants for life, 612
 - families where the limitations are for life, with remainders to children, *ib.*
 - not implied so as to divest vested interests, *ib.*
 - whether cross-limitations implied where contingent interests are given over if all legatees die before vesting, *ib.*
 - where cross-remainders apply to accruer clause, 613
- by reference to another instrument, 597
- by recital, 613
 - that a person is entitled under another instrument, *ib.*
 - of a supposed gift by the will, *ib.*
 - gift in addition to a supposed gift, *ib.*
 - there must be nothing to which the recital can refer, *ib.*
 - recital will not cut down a prior gift, *ib.*
- of hotchpot clauses, 636, 637

IMPROVE,

- trust to, not within Thellusson Act, 490

IMPROVEMENTS,

- power to make, 381, 382
- by tenant for life, 432

INACCURATE DESCRIPTION (see **DESCRIPTION, MISTAKE**), 107—111, 222—225, 305**IN ADDITION,**

- whether gift, is liable to restriction of prior gift, 125, 126
- gifts, to prior supposed gift, 613
- (See **ADDITIONS**.)

IN CASE OF DEATH,

- gift over (see **GIFTS OVER**), 529—531

INCLUSION,

- of particular things in a residue, effect of, 188

INCOME,

- gift of, for maintenance, vests absolutely as it accrues, 149
- of severed fund passes to legatee, 153
- on share of appointed fund passes, *ib.*
- specific devise or legacy carries, 143, 144
- contingent residuary bequest carries, 146
- under gift to class, 147, 148
- joint tenancy severed as regards, as it accrues, 332
- gift of, when it passes the absolute interest, 340, 394, 395
 - part of annual, of a fund, effect of, 413
 - intermediate, effect of upon vesting, 464—467
- (See CAPITAL AND INCOME, RENTS AND PROFITS, PROFITS, TENANT FOR LIFE AND REMAINDERMAN.)

INCOME TAX,

- gift free from, 157

INCONSISTENCY,

- in testamentary instruments, 41
- in description (see DESCRIPTION), 220—225
- of two inconsistent gifts, the later prevails, 617
- exception where testator uses printed form, *ib.*
- devise of same property to two persons in fee, 618
- devise of same property with and without words of limitation, *ib.*
- gifts of whole estate and residue, *ib.*
- gift of residue and remainder, *ib.*
- gift of all followed by gifts of part of testator's property, *ib.*, 619
- argument in favour of revocation is stronger as between will and codicil, 619
- (See REVOCATION, 614—617; CHANGING WORDS, 620; SUPPLYING WORDS, 621, 622.)

INCORPORATION,

- of documents in will, 60—64
- rule as to, 60
- document not in existence, 61
- document written between date of will and codicil, *ib.*
- memorandum on back of will, *ib.*
 - referring to contents of will, 62
- reference to will, *ib.*
 - by date, 63
- effect of incorporated paper, *ib.*
- whether it requires to be proved, 70
- of entries subsequent to will, 634, 635

INCREASE,

- in value of specific bequest passes with it, 110
- rents and profits given to charity, 308, 309

INCUMBRANCES,

- rights of tenant for life redeeming or paying off, 434, 435
- purchase of, by tenant for life, 436

INDEFINITE FAILURE OF ISSUE,

- what imports, 582—587 (see DEATH WITHOUT ISSUE)

INDEMNITY,

- construction of indemnity clause, 389
- right of executor to, 377, 383

INDIVIDUALS,

- gift to, composing voluntary society, 297
- gift to individual and remote class void, 482

INFANT,

- domicile of, 4, 5
- cannot make will, 15
- soldier or seaman over 14 may make a will, 51
- cannot appoint guardians, 83
- legacy to, guardian may give receipt for, *ib.*
- interest on legacy to, when payable, 152—154
- severance of joint tenancy by, 331
- consent by, to exercise of power of sale, 368
- maintenance of, 384—387 (see MAINTENANCE)

INHERITANCE,

- trustees of, take the fee, 357

IN LIEU,

- gift, subject to conditions of original gift, 125, 126

INSOLVENCY,

- meaning of, 508

INSTRUCTIONS

- for will, when effective, 12

INSURE,

- power to, 381
- when tenant for life bound to, 430

“INTENT, TO THE,”

- creates trust, 398

INTENTION OF TESTATOR. See EVIDENCE.

INTEREST,

- change of testator's, 130—132
- when it passes with capital, 143—148 (see RENTS AND PROFITS;
INCOME)
- on legacies, 4, 148—154
 - effect of Conveyancing Act, 148, 149
 - Lord Cranworth's Act, 149
 - legacy charged on land, *ib.*
 - payable out of proceeds of sale, *ib.*
- where no time of payment is fixed, runs from the end of a year,
149
 - where executors have power to accelerate or delay payment,
150
 - on legacy payable out of assets when received, *ib.*
 - on legacy charged upon personalty and a reversion in realty,
ib.
 - on legacy charged on a fund wholly reversionary, *ib.*
 - on legacy to infant executor, *ib.*, 151
 - when the testator is *in loco parentis*, 151
 - when the legatee is an infant and maintenance is given, *ib.*
 - on legacy in satisfaction of a debt, *ib.*
- when a time of payment is fixed, runs from then, *ib.*
- right of personal representatives, 152
- when the legatee is an infant and the testator is *in loco
parentis*, *ib.*

INTEREST—continued.

- when there is a general intention to provide maintenance, 152
- on severed fund, 153
- on share of appointed fund, *ib.*
- future gift of principal and interest, *ib.*
- when the legacy is given over upon a contingency, *ib.*
- effect of Conveyancing Act, 1881, on accumulations where legacy given over, *ib.*, 154
- rate of interest, 154
- on portions, *ib.*
- arrears for six years may be recovered, *ib.*
- on arrears of annuities, 155
- effect of gift of intermediate, on vesting, 464—467
- on advances, what allowed, 636
- when Crown charged with, as against next of kin, 650

INTEREST IN LAND,

- within Mortmain Act, what is, 312—317

INTERLINEATIONS,

- rules as to, 32, 33

INTERMEDIATE RENTS. See RENTS.**IN TERROREM,**

- conditions, what are, 499, 500, 501
- doctrine of, whether it applies to conditions precedent, 500, 501

INTESTACY,

- effect of reference to, 282, 283
- gift over upon, 505, 506
- who entitled in case of, 648—651

IN THE SAME MANNER,

- gifts given, as prior gifts, 594, 595

INVENTORY,

- tenant for life must sign, 439

INVEST, INVESTED,

- trust to, may give power of sale, 364
- whether gift of sum invested in particular way is specific, 116

INVESTMENT,

- power of, 378, 379

IRISH PROBATE, 70**ISSUE,**

- I. Used as word of purchase—
 - gifts to parents and issue, 251, 252
 - includes all descendants, 267
 - intention to keep estates in a single line, *ib.*
 - in what case it means children, *ib.*, 268, 351, 354, 355
 - of issue means issue of children, 268
 - lawfully begotten, *ib.*
 - one remainder to children another to issue, 269
 - issue in different gifts, *ib.*
 - successive limitations of same property, *ib.*

ISSUE—*continued.*

- when the class is to be ascertained—
 - when the gift is substitutional, 269
 - when the gift is in remainder, 270
 - in the case of cross-remainders, *ib.*
- application of rule in *Mandeville's Case*, 278, 279
- II. used as a word of limitation—
 - in the case of realty
 - devise to A. and his issue, 344
 - effect of words of distribution superadded, *ib.*
 - rule in *Wild's Case* applies to a devise to several and their issue and their heirs as tenants in common, *ib.*
 - devise to the issue of a tenant for life, 354—356. (See *SHELLEY'S CASE*, rule in.)
 - in the case of personalty
 - gift to A. and his issue, 392
 - effect of gift over in default of issue, *ib.*, 393
 - where realty and personalty are given together, 393
 - intention not to use it as a word of limitation, *ib.*
 - gift to A. for life, remainder to his issue, *ib.*, 394
- III. Gifts over upon death without, 575—587. (See *DEATH WITHOUT ISSUE.*)
 - unmarried and without, 569, 570
 - without leaving or having, 574, 575

J.

JEWS,

position of, as regards charitable gifts, 299

JOINT AND SUCCESSIVE INTERESTS, 325—335

JOINT TENANCY,

property held in, not devisable, 75
co-heirs take in, 277

JOINT TENANCY AND TENANCY IN COMMON, 328—334

- what creates joint tenancy, 328, 329
- whether interests of joint tenants must vest at same time, 328
- devise to two in tail who may marry, *ib.*
- appointment to object and non-object of power, *ib.*
- joint life estates, several inheritances, 329, 330
 - devise to several in tail who cannot marry, 329
 - and heirs of their respective bodies, *ib.*
 - and their respective heirs, *ib.*
- bequest to several and their respective executors, *ib.*, 330
- devise to several and the survivor and his heirs, 330
- severance of joint tenancy, 330—332
 - destruction of unity of estate, 330
 - severance by disposition, *ib.*, 331
 - lease, 331
 - petition or summons for payment, *ib.*
 - marriage, *ib.*
 - agreement, *ib.*, 332
- what creates tenancy in common, 332—334
 - Court leans to tenancy in common, 332
 - "to be divided," "equally," "between," "respectively," *ib.*
 - share, participate, *ib.*
 - gift to a class at twenty-one, *ib.*

JOINT TENANCY AND TENANCY IN COMMON—*continued.*
 incidents inconsistent with joint tenancy, 333
 gift over on death without issue to member of the class, *ib.*
 power to appoint in tenancy in common, *ib.*
 executory trust, *ib.*
 direction to secure, *ib.*
 issue substituted for parents take jointly, *ib.*, 334
 unless there are words of severance applicable to issue, 334
 as regards issue substituted joint tenancy is severed, *ib.*

JOINT WILLS,
 whether valid, 13

K.

KIN, NEXT OF, 281—289

L.

LAND,
 description of, in devises, 101—109
 may exclude buildings, 170
 legacies connected with, whether specific, 117, 118
 (See DESCRIPTION.)
 devise of, is specific, 117
 on trust to sell and divide, *ib.*
 where it carries rents, 145, 146, 147
 when it includes leaseholds, 182, 183
 on condition of paying a legacy creates a charge, 673

LANDS CLAUSES ACT,
 effect of sale under, on conversion, 216, 219

LANDS NOT SETTLED,
 devise of, 179, 180

LAND TAX,
 on land in mortmain, gift to redeem, 322

LAPSE,
 whether a gift to A. or his executors will fail by, 292, 638, 640, 641
 of gift to charity, 304, 305
 will not make a gift over bad in itself valid, 506, 519
 effect of, upon gifts over, 506, 519, 563, 564
 doctrine of, 638
 whether codicil gives lapsed legacy to executors of legatee, *ib.*
 gifts to tenants in common by name, *ib.*
 applies to a power of appointment exercised by will, *ib.*, 639
 gift to debtor of debt is subject to lapse, *ib.*
 whether legacies to creditors are subject to, *ib.*, 640
 declaration against, effect of, 640
 interests arising in default do not fail by death of donee of power, *ib.*
 nor interests in remainder by death of tenant for life, 641
 charges will not fail by death of devisees charged, *ib.*
 effect of the Wills Act upon, *ib.*, 642

LAPSE—continued.

- doctrine of, in cases of gifts to a class, 643
- direction to settle a share, *ib.*, 541
- person incapable of taking at death is not member of class, 643
- appointment to objects and non-objects, 644
- revocation of share of member of the class will not cause, *ib.*
given to individual, *ib.*
- what is a gift to a class, *ib.*
- gift to persons "before named," *ib.*
- gift to the five daughters of A., *ib.*
- gift to a class and named individual, 645
- hotchpot clause applies to lapsed share, 636
(See **RESULTING TRUSTS**, 645—647)

LAPSED LEGACIES,

- where they will not pass under residue, 191—195

LAWFUL HEIRS,

- devise to A. and his, creates fee, 336

LEADING WORDS

- of description, what are, 108, 109, 220—226

LEASE,

- bequest of, by what law governed, 1, 476
- effect of gift of, on renewed lease, 130, 131, 132
on after-acquired reversion, 130, 131, 132
- by joint tenant effects severance, 331
- when trustees can grant, 379
- executor may grant, 380
- with option to purchase bad, *ib.*
- of several properties together, *ib.*
- power of leasing not accelerated, *ib.*
- power of tenant for life to grant, 435
- covenant of tenant for life to renew, *ib.*

LEASEHOLDS,

- duties of trustees as to, 381
- apportionment on sale of, between tenant for life and remainderman, 449

LEASEHOLDS FOR LIVES,

- effect of general devise on, 181

LEASEHOLDS FOR YEARS,

- will of, governed by *lex loci*, 1
- are within Locke King's Act, 138
- are within Mortmain Act, 313
- are not within Statute of Uses, 359
- effect of general devise on, 182, 183
- what words will pass them, 170, 171, 176
- devise for life with remainders, effect of, 518
- gift by foreign will of, subject to rule against perpetuities, 476

LEASEHOLDS, RENEWABLE,

- conversion of, into fee simple, effect of, 219
- power of trustees to renew, 381, 382
- duties of tenant for life as to, 436
- apportionment of fines, 437—439

LEASING POWER,

- effect of, on devise to trustees in fee, 361
- what is a general, 362
- whether it authorizes mortgage by demise, 376
- whether trustees have, 379, 380
- when void for remoteness, 479
- whether included in usual powers, 602

LEAVING CHILDREN, LEAVING ISSUE,

- construction of gift over upon death without, 574, 575
- in cases before the Wills Act, 582—587

LEGACIES,

- obliteration of, 38, 39
- under power, when specific, 117
- when payable, 149
 - for life with remainder, 149
- meaning of the word
 - applies primarily to personalty, 167
 - when it refers to realty, *ib.*, 168
 - includes annuities, 168
 - effect of use of word in substitutional gifts, 544
- interest on (see **INTEREST**), 149—154
- abatement of (see **ABATEMENT**), 659—662
- specific (see **SPECIFIC LEGACY**), 113—121
- to be applied for benefit of legatee, 405
- when charged on land, 670—674

LEGACY DUTY,

- what is a gift free from, 155, 156
- on charitable legacy was within Mortmain Act, 312
- where estate insufficient to pay legacies in full, 659

LEGAL ESTATE,

- whether it passes under securities for money, 162, 163
 - money on security, 163
- in trust and mortgage estates, when it passes by general words, 184—186
- devise to uncertain body, 297
- whether devise to a college carries, 321
- whether devise on secret trust for charity carries, 324
- when trustees take (see **TRUSTEES**), 357—360

LEGAL OR NEXT OF KIN,

- meaning of, 281

LEGAL REPRESENTATIVES, 289—291. See REPRESENTATIVES.**LEGATEE,**

- who may be (see **DEVISEE**.)
- residuary, when takes realty, 167, 168, 211—213
- bound by investment in consols, 387, 388

LEGITIMACY,

- how determined, 238, 239

LETTER,

- when it revokes will, 44

LIABILITIES,

right of legatee to exoneration from, 134, 135

LIBELLOUS PASSAGES

may be omitted from probate, 23, 24

LIBERALITY,

gift for purposes of, not charitable, 298, 299

LIEN,

of vendor within Locke King's Act, 139

LIFE, ESTATE FOR,

in consumable property, 518

gift at the death of the legatee, 519, 530

in annuity, what creates, 412—414

for life of A. and B., duration of, 420—422

whether it will be enlarged *cy-près*, 488

LIFE INTEREST,

when joint, with several inheritances, 329, 330

devise without words of limitation before Wills Act passes, 419

implication of (see **IMPLICATION**), 604—607

LIMITATIONS

and conditions distinguished, 450

what cannot be the subject of successive, 518—520

legal remainders and executory interests, 520—522

in remainder and subject to a term, 522, 523

ulterior and alternative to void limitations, 481, 523

when contingency runs through a series of, 524, 525

LIMITATIONS, STATUTE OF,

whether tenant for life can set up against remainderman, 437

LIMITATION—WORDS OF,

what are to pass the fee, 336—338

devise to A. and his heirs, 336

A. and his lawful heirs, *ib.*

A. and his executors, *ib.*

when the fee will pass without (see **FEE SIMPLE**), 338—341

what are, to pass an estate tail (see **ESTATE TAIL**), 341—344

heirs of the body, issue, 341

heirs male, *ib.*

words occasionally used as, 344—347

child, son, 344, 345

eldest son, 345

children (see **WILD'S CASE**, rule in), 345—347

superadded,

in a devise to A. and the heirs of his body, 349, 350

several and their issue, 344

A. for life, remainder to his heirs, 351

inconsistent with descent pointed out by first words, 351

when the limitation is to the *heir* of the tenant for life, 353

issue of the tenant for life, 355

in bequests of personal estate, 390—394

executors, 390

heirs and heirs of the body, *ib.*, 391, 392

issue, 392—394

when the word survivors is used as, 549

effect of, upon gifts in default of issue to survivors, 585, 586

- LINEAL HEIR MALE**,
must trace descent through males, 277
- LIVE AND DEAD STOCK**,
meaning of, 166
- LIVING**,
when it passes advowson, 170
- LOCALITY**,
reference to, in descriptions, 103, 108
gift of things in a, 130, 165, 166, 190, 191
gift for benefit of, is charitable, 296
- LOCKE KING'S ACT** (see **EXONERATION OF MORTGAGED PROPERTY**),
135—143
- LONDON**,
gift to hospitals of, construction of, 174
- LONG ANNUITIES**,
bequest of, 115
- LOST WILL**, 46, 47
- LUNATIC**,
domicile of, 5
election on behalf of, 90
sale by Court of lunatic's property, whether effecting ademption
127
effect of taking lands of, under Lands Clauses Act, 219
money of, invested in land, when it remains personalty, *ib.*
- M.**
- MAINTENANCE**,
when interest will be allowed for, 148, 149
gift of annual sum for, duration of, 414, 415
intermediate interest for, effect of upon vesting, 465—467
trust for, whether it passes to creditors on bankruptcy, 406—408
power of, 384—387
power under statutes, 384, 385
includes education, 385
discretionary powers, *ib.*, 386
allowed contrary to terms of will, 386
sum expended for, without authority, *ib.*
power of Court to charge infant's estate, *ib.*, 387
accumulation of past years, when applicable for, 387
gift to parent for, not subject to account, 404, 405
gift for, whether to separate use, 513
duration of power of, 491
- MALE HEIR**,
whether must trace descent through males, 277, 278
- MALE LINE**,
next of kin in, meaning of, 283

MALE NEPHEW,
gift to, 266

MANAGEMENT,
powers of, 380, 381

MANAGER,
request to employ a person as, 85, 86

MANDEVILLE'S CASE,
rule in, 278, 279

MANOR,
what it includes, 169

MANSION HOUSE,
pulling down, is waste, 425
effect of pulling down, on ornamental timber, *ib.*
when tenant for life may complete, 432

MARINER, 48—56 (see SEAMEN).

MARK,
sufficient signature to will, 24

MARRIAGE,
revokes will, 35
severs joint tenancy, 331
estate to arise upon, of tenant for life when vested, 457
gift after death, when it takes effect on, 458
gift to be paid upon, is contingent, 463
effect of gift of intermediate income, *ib.*
gift upon, construed as gift at twenty-one or upon marriage under
twenty-one, *ib.*, 621
conditions in restraint of (see **CONDITION**), 498—502
effect of, on gift over on alienation, 509
gift over upon, without consent limited to minority, 536
death before, 569—572
portion may be paid under power of advancement, 387

MARRIED WOMAN,
domicile of, 5
will of, where valid, 15—19
probate of will of, 67, 68
can act as executrix, 80
election by, 90
when will of, raises election, 96
power vested in, when executed by general words, 197
not within 43 Geo. III. c. 108...322
property appointed by, is subject to debts, 663, 664
(See **HUSBAND AND WIFE, DIVORCE.**)

MARSHALLING, 666—669
is not affected by Locke King's Act, 143
in favour of rent-charge, 418
in what cases the assets will be marshalled, 666
between legatees and heir or devisee charged with debts, 658, 667
legatee and devisee of mortgaged lands, 667
legatee and residuary devisee, *ib.*

MARSHALLING—*continued*.

- between legatee and devisee subject to lien for purchase money, 667
 - legatees with and without a charge on realty, *ib.*
- assets will not be marshalled in favour of charity, 668
- effect of direction to pay charities out of pure personalty, *ib.*
 - reserve pure personalty for charity, *ib.*

MASSES,

- gifts for, 300, 301

MAXIMS,

- Dies incertus conditionem in testamento facit*, 463
- Falsa demonstratio non nocet cum de corpore constat*, 105—107
- Nemo est heres viventis*, 276
- Non accipi debent verba in falsam demonstrationem quae competunt in limitationem veram*, 102—107
- Veritas nominis tollit errorem demonstrationis*, 223

MESSAGE,

- or house, meaning of, 171

MINES,

- devise of, whether carries past rents, 169
- rights of tenant for life as to, 429, 430

MINING SHARES, 164**MINISTER,**

- when gift to, is charitable, 303

MINORITY,

- gift of maintenance during, 152
- meaning of, 466
- gift of annuity during, 415, 416

MISSIONARY PURPOSES,

- gift for, is void, 299

MISTAKE,

- when words inserted by, omitted from probate, 23
- in testator's belief will not raise election, 89
- in description of things, effect of, 109—111
- bequest of thing sold before the date of the will, 110
 - testator never possessed, 111
- in description of persons, 222—225
 - charity, 305
- in number of children, 249, 250
- legacy in discharge of a debt which does not exist, 405
- in recital will not alter the gift, 617
- in testator's belief, will not cause revocation of or addition to a legacy, *ib.*
- in amount of advances binds legatee, 634

MOIETY,

- meaning of, 174
- when it will pass the fee, 338

MONASTIC ORDERS,

- gifts to, 299, 300

MONEY,

- when gift of, is specific, 114, 115
- what it includes, 158—162
- when it will pass the residuary personalty, 159, 160
- ready money, 160, 161
- “due and owing at my decease,” what it includes, 160
- in the funds, 161
- securities for, 162, 163
- on security, whether it passes the legal estate, 163

MORTGAGE,

- vests in executor, 77
- beneficial interest in, when it passes by general words, 184
- legal estate in, when devisable, 77, 78
 - when it passes by general words, 184—186
- exoneration of (see EXONERATION), 135—143
- successive and concurrent, how borne, 142, 143
- severs joint tenancy, 331
- when authorized by power of sale, 364
- power to, 375—376
- may be made under leasing power, 376
- what words give power to, *ib.*
- power of executor over personalty, *ib.*
- power to, for purposes of business, 382
- tenant for life must keep down interest on, 433, 434
- apportionment of loss on insufficient, 448, 449
- (See INCUMBRANCES.)

MORTMAIN,

- gifts in (see CHARITY), 310—324

MOTIVE,

- description supplying prevails, 226
- distinguished from trust, 404
- gift from motive based on mistake, 405
- equal legacies given from same, are substitutional, 125

MOVEABLE PROPERTY,

- what is, 1

MUSEUM,

- land may be devised for, 323

MUTUAL WILLS,

- validity of, 13

“MY,”

- effect of word in excluding property subject to a power, 206
- making legacy specific, 114, 116

N.**NAME,**

- when it prevails over the description, 223, 224, 225
- condition of taking a particular, 503
- devise to heir of a particular, 277
- gift to next of kin of a particular, 284
- right to sue in testator's name, not devisable, 75
- gift to persons before named may mean before mentioned, 596
- hereafter named, when none are named, *ib.*

NAMELY,

whether it restricts large words, 187

NEAREST OF KIN (see NEXT OF KIN), 283, 284

NEAREST RELATIONS (see RELATIONS), 271

NEPHEWS AND NIECES,

meaning of, 265, 266

refers *primâ facie* to children of brothers and sisters, including the half-blood, 265

great-nephew called a nephew, *ib.*

in what cases a wife's nephew may take, *ib.*, 266

in what cases grandnephews may take, 266

male nephews, gift to, *ib.*

whether gift to, raises equivocation between nephews proper and wife's nephews, 224, 225

NEXT HEIR,

when it is a word of limitation, 353

NEXT LEGAL REPRESENTATIVES,

meaning of, 291

NEXT MALE KIN,

meaning of, 283

NEXT OF KIN,

bequests to, 281—289

meaning of, 281

legal or next of kin, *ib.*

half blood admitted, *ib.*

selective power to appoint to, *ib.*

ex parte materna, *ib.*, 282

effect of reference to the statute or intestacy, 282

husband or wife do not take as next of kin, *ib.*

when widow included, *ib.*

intention to leave property to next of kin not carried out, *ib.*

what will exclude one of the next of kin from the class, *ib.*

whether the statute fixes the proportions as well as the persons, *ib.* 283½

nearest of kin by way of heirship, 283

in the male line, *ib.*

nearest of a class, *ib.*

of a particular name, 284

gifts to, exclusive of A. who is sole next of kin, *ib.*, 285

meaning explained by context, 285

of A. as if she had died unmarried, *ib.*

of A. as if she had died without ever having been married, *ib.*, 285

when the class is to be ascertained (see CLASS), 286—289

gift to, after A.'s death, when it gives A. a life interest, 605, 607

election by,

title as, to an intestate may raise election, 90, 91

of married woman, whose will becomes inoperative not put to election, 96

NEXT OF KIN—*continued.*

- title as, in case of intestacy,
 - how their legitimacy is determined, 239
 - to interests undisposed of under trusts for conversion, 213, 214
 - how they take property to be converted, 214, 215
 - to accumulations released by statute, 494
 - when they take interests undisposed of, 648—651
 - direction that one of the next of kin is to take no share when effectual, 214, 649

NEXT PRESENTATION,

- under what words it passes, 170

NEXT SURVIVING SON,

- meaning of, 233, 234

NICKNAMES,

- evidence of meaning of, admissible, 101, 220, 221

NIECES,

- meaning of, 265, 266

NOR,

- meaning of in condition precedent, 620

NOTICE,

- of condition, not necessary for forfeiture, 496
- to treat, effect of upon conversion, 216

NOW,

- whether it restricts general words to the date of the will, 106, 107, 164
- invested, gift of a sum, whether specific or demonstrative, 116

NUMBER,

- of children, mistake in, 249, 250

NUNCUPATIVE WILL,

- who may make, 52

O.**OBJECTS OF VIRTU,**

- gift of, 165

OBLITERATION,

- of part of will, effect of, 32—34
- legacy, 38

OCCUPATION,

- description by, 103, 108
- when it passes easement, 173
- devise of use and, 172, 173

OFFICE,

- gifts in respect of, to executors, 292, 293
- when charitable, 303
- duration of annuity in respect of, 415

OMISSION. See BLANKS, SUPPLYING WORDS.

ONE

of a class, gift to, 232

ONEROUS LEGACIES,

when they may be rejected, 88, 89

ON THE DEATH,

effect of, upon gift on failure of issue, 583, 584

OPTION,

to purchase, nature of, 174

to purchase, effect of, on a devise, 216, 217

whether executor can give lessee, 380

legatee may exercise after compulsory sale, 174

OR,

when changed into And,

in a devise to A. or his heirs, 343

A. or the heirs of his body, *ib.*

in a gift apparently substitutional, 539, 540

in a condition precedent to vesting, 620

in gifts over, 572, 573

if A. dies under age or without issue after devise in fee, 572

after devise for life, re-

mainder in tail, *ib.*

gift over on failure of issue or some other event, 573

if A. dies under age or without issue, after devise in tail, *ib.*

after a gift to be vested in one or other of the two events, *ib.*

gift over upon death before the tenant for life or under twenty-one, *ib.*

or explained by the context to mean and, *ib.*

ORDER OF ASSETS (see ASSETS), 656—664

ORDER OF COURT,

as affecting conversion, 219

ORIGIN, DOMICIL OF,

what is, 4

when it revives, 8

ORIGINAL WILL

may be looked at, 102

ORNAMENTAL TIMBER,

what is, 425

OTHERS,

survivors when construed (see SURVIVORS), 549—554

others will not be read survivors, 554

OTHER SONS,

gift to second and, when it includes a first son, 237

OUTLAWRY,

abolished, 20

P.

PAID,

may mean vested, 462

PARENT AND CHILDREN,

bequest to, 325—328

primâ facie gives concurrent interests, 325

gift to parent in trust for herself and children, *ib.*

words of distribution applied to children only, 326

limitation applied to children only, *ib.*

settlement directed of the whole fund, *ib.*

continuing trust, *ib.*

gift of whole to the separate use, *ib.*, 327

parent's interest only to the separate use, 327

division of the whole at a particular time, *ib.*

gift over of the whole, if no children, *ib.*

children contemplated as taking the whole, *ib.*

express gift to afterborn children, 327

part of the fund payable at a future period, *ib.*, 328

gift to children in unequal shares in certain events, 328

children referred to as heirs, *ib.*

effect of reference to other gifts, *ib.*

executory trust, *ib.*

bequests to parents for life and then to their children, 253, 254

devises to (see *WILD'S CASE*, rule in), 345, 346, 347

bequests to parent in trust for, 403, 404

when legacy to child may be paid to parent, 404, 405

PARENT AND ISSUE,

bequests to, 251, 252, 253

PARISH,

gift for benefit of, 296

PARK,

land may be devised for, 323

PAROL

evidence, when admissible (see *EVIDENCE*)

trust, evidence of, when admitted, 64, 65, 66

PART,

devise of, when it passes fee, 338

PARTICIPATE,

creates tenancy in common, 332

PARTICULAR RESIDUE,

what is, 191, 192

PARTICULARS,

enumeration of, effect of, on large words, 187—191

specific enjoyment, 444, 445

PARTITION

authorized by power of sale and exchange, 364

PARTNERSHIP

profits, when apportionable, 145, 440

property, power of executor over, 376, 377

PATENT AMBIGUITY

may not be explained by evidence, 102, 221

PATERNITY,

description of illegitimate child with reference to, 244, 246

PATRIMONY,

meaning of, 167

PAYABLE TO,

effect of gift over if property becomes payable to another, 508

PAYMENT

into court, effect of, on discretionary trust, 386, 387

of legacies (see **INTEREST**), 148—154

death before, gift over upon, 563—567

after a direct gift,

takes effect if legatees die before testator, 563

die before time of payment where

one is fixed, *ib.*

refers to death before testator where no time of payment named, *ib.*

after a life interest,

takes effect if legatees die before tenant for life, where no time of payment is fixed, 563

where there is a life interest and period of payment,

takes effect on legatee dying before testator, 564

when gift is contingent on attaining twenty-one, *ib.*, 565

when gift is vested at twenty-one or marriage, 565

when gift is vested at birth to be paid at twenty-one, *ib.*, 566

when the original gift is contingent on surviving the tenant for life, 566, 567

PECUNIARY LEGACIES

include annuities, 168

PENCIL,

alterations of will in, 33

PER CAPITA AND PER STIRPES (see **DISTRIBUTION**), 251—254, 291**PERFORMANCE**

of conditions, 498—503

PERMISSIVE WASTE,

liability for, 595

rules as to, 430, 431

PERMIT,

effect of word, in gift over, 508

PERPETUITY, 475—489

statement of the rule, 475

gift not charitable, void if it involves, 297

testator cannot direct property not to be used, 475

gift for maintenance of horses and dogs living at testator's death is valid, *ib.*

covenant to reconvey, when void, *ib.*

PERPETUITY—*continued*.

- how far rule applies to charities, 304, 306, 476
- gift of English leaseholds by foreign will, 476
- direction to buy foreign land, *ib.*
- the rule applies to legal remainders, *ib.*
- remainder to unborn son of unborn person void, *ib.*
- the state of things existing at the death is to be considered, 477
- the fact that a woman is past child-bearing rejected, *ib.*
- gift tending to tie up property is void unless charitable, *ib.*
- restraint upon anticipation, *ib.*
- devise to named person upon remote event, 478
- whether limitations subsequent to an estate tail can be too remote, *ib.*
- term precedent to an estate tail may be too remote, *ib.*, 479
- concurrent terms, 479
- accumulation for payment of debts is valid, *ib.*
 - till a fund reaches a certain sum, when valid, *ib.*
- whether powers of sale and leasing can be void for, *ib.*, 370, 371, 480
- trust for sale may be void, 480
- gift to persons who must be living at the testator's death and time of vesting good, *ib.*
- gift is void if the event is too remote, though the persons may not be, *ib.*
- gift for life to unborn children of tenant for life is good, *ib.*
- cross limitations between unborn tenants for life, *ib.*
- substitution of issue, 481
- remote gift over of life interest, *ib.*
- remainders after life interests of unborn persons, *ib.*
- limitations following upon void limitations are void, *ib.*
- appointments under powers, *ib.*
- splitting compound events, *ib.*, 482
- gift to a class to be ascertained beyond limits of perpetuity, 482
- whether gift to an individual and a remote class is void, *ib.*, 483
- where the shares of the members of the class can be severed, *ib.*, 484
- gift to a person satisfying a description must be ascertained within limits of, 484
- effect of the words as far as the rules of law permit, 484, 485
- direction that personalty is not to vest in a tenant in tail dying under twenty-one, 485
- power exercised within limits of perpetuity, is good, *ib.*
- appointments under general powers, 486
 - under special powers, *ib.*
- invalid restrictions upon a valid gift may be rejected, 487
- cy près* (see *CY PRÈS*), 487—489

PERSONÆ DESIGNATÆ,

gifts to (see *DESCRIPTION*), 220—226

PERSONAL PROPERTY,

- estate and effects, gift of, confined to personalty, 175
- described by reference to locality, 165, 166 (see *LOCALITY*)
- bequests of, to heirs, 279—281
- absolute interests in, 390—403

PERSONAL REPRESENTATIVES,

meaning of (see *REPRESENTATIVES*), 289—291

PERSONAL RESIDUE,

questions between real and, 202, 203

PLACE. See LOCALITY.

PLANT AND GOODWILL,
meaning of, 167

PLATE,
meaning of, 164
use of, what passes under, 173

POLICE RATES,
charge on, within Mortmain Act, 316

POLICY,
moneys arising from, effected by tenant for life belong to him,
437
direction to keep up, when not within Thellusson Act, 490

POOR RATES,
charge on, within Mortmain Act, 316

POOR RELATIONS,
gifts to, whether charitable, 302

PORTIONS,
interest on, 154
when younger children means children entitled to, 235—237
vesting of (see VESTING), 459
what are, within the exception in the Thellusson Act, 491—493
satisfaction of, by legacies (see SATISFACTION), 624—628

“POSSESSED OF,”
whether gift of all which testator is, passes realty, 177
effect of these words in passing leaseholds, 182

POSSESSION,
title by, is devisable, 75
gift over on death before, 565
meaning of, in shifting clauses, 588, 589
of real estate, bequest of chattels to person in, 593
when tenant for life let into, 439

POSTHUMOUS CHILD,
gift when confined to (see CHILD EN VENTRE), 248

POWER, POWERS,
will under, how far governed by domicile, 1, 2
how revoked, 35, 36, 42
will of married woman under, 16, 17
to make unattested will void, 64
to arise on contingency, when exercisable, 75
to contingent person, *ib.*
to be exercised in writing, 76
testamentary, what is, *ib.*
effect of Wills Act on execution of, 77
distinguished from estate, 365
property, 395, 396
trust, 397
survival of, 366, 367
whether personal or given *virtute officii*, 367
what will be inserted in executing executory trusts, 602
of advancement, 387 (see ADVANCEMENT)

POWER, POWERS—continued.

- of appointment (see **APPOINTMENT**)
 - added to gift of income, 394
 - added to absolute gift, 395
 - added to life interest, 390, 396
 - to relations, construction of, 271
 - to family, construction of, 274, 275
 - to next of kin, construction of, 281
 - to tenants in common, how executed, 333
 - whether determined by gift over on bankruptcy, 423
 - vesting of gifts under, 473, 474
 - how affected by rule against perpetuities, 485
 - cy pres* doctrine applies to execution of, 486
 - legacy in exercise of non-existing, whether specific, 117
 - implication from, when not executed, 609, 610 (see **IMPLICATION**)
 - effect of execution of, by married woman on creditors, 663, 664
 - execution of general, 195—203 (see **GENERAL POWERS**)
 - execution of special, 204—208 (see **SPECIAL POWERS**)
- of appropriation, 387—389 (see **APPROPRIATION**)
- of carrying on business, 382—384 (see **BUSINESS**)
- of compromise, 377, 378
- of conversion, 377 (see **CONVERSION**)
- of executor, 376, 377 (see **EXECUTOR**)
- of giving receipts, 376
- of insurance, 381
- of investment, 378, 379
- of leasing, 379, 380 (see **LEASING POWER**)
- of renewing leases, 381, 382
- of maintenance, 384—387 (see **MAINTENANCE**)
- of management, 380, 381
 - and disposition distinguished, 602
- of mortgaging, 375, 376 (see **MORTGAGE**)
- of sale, 364—375 (see **SALE, POWER OF**)
 - effect of, on estates of trustees, 360

PRECATORY WORDS,

- when they create a trust (see **TRUST**), 398—405

PRE-EMPTION,

- right of, must be literally construed, 174

PREMISES,

- meaning of, 173

PRESENT TENSE, 106 (see “Now”)

PRESUMPTION

- none in favour of sanity, 14
- as to date of alterations in will, 33
- no will to be revoked by, 36
- that will is duly executed, 69
- against executor's title to residue, 653, 654

PRINTED FORM,

- effect of will in, where there are two residuary gifts, 617

PRIORITY

between legatees (see ABATEMENT), 659—661

PRIVATE CHARITY,

gift for, is void, 299

PROBATE,

on what evidence granted, 69

what entitled to, 67—72

instrument naming executor, 67

contingent will or codicil, *ib.*

instrument naming guardians, *ib.*

will of married woman, *ib.*, 68

will of realty, 68

foreign will, *ib.*

what should be included in, 70

when scandalous passage omitted, 23

where granted, 71

effect of, on realty, 34, 71

conclusive on question of fraud, 72

PROFESSIONAL SERVICES,

power to charge for, 389

PROFITS. See RENTS AND PROFITS.

what are, accruing after death of testator,

bonus on shares declared before the death, payable afterwards,
144

partnership, declared after death for a period ending in life-
time, *ib.*

debts are, of the year when they are got in, *ib.*

apportionment of, *ib.*, 441

PROMISE

to leave property by will, 13

PROPERTY,

when it will pass realty, 175

when it will pass the fee, 338

devise of, whether it executed general power over realty, 196

distinguished from power, 365, 395, 396

PROTECTED LIFE INTERESTS, 406—408

PROTECTION ORDER,

will of married woman after, 19

PROVIDE,

gift to, a school, 318

PUBLIC COMPANY,

what is, 379

PUBLIC POLICY,

conditions contrary to, validity of, 451, 495, 498

PUR AUTRE VIE. See ESTATE PUR AUTRE VIE.

PURCHASE ANNUITY,

effect of direction to, 410—412

"PURCHASED,"
gift of property, 161

PURCHASED LAND,
when power of sale extends to, 364, 365

PURCHASE MONEY,
for land devised and afterwards sold, right to, 215, 216

PURPOSE,
gift for a particular, when legatee entitled absolutely, 405
adeemed if purpose is satisfied by testator,
634

Q.

QUARRIES,
rights of tenant for life as to, 429, 430

R.

RAILWAY SHARES
include stock, 164

READY MONEY,
meaning of, 161

REAL EFFECTS
will pass realty, 177

REAL ESTATE,
probate of will of, 68, 71
words appropriate to, 175—178
devise of, when it carries leasehold, 176, 177, 183

REAL RESIDUE,
questions between, and personal residue, 202, 203

REAL SECURITY,
mortgage on, meaning of, 163
power to invest in, 379

REBUILD,
when tenant for life bound to, 430

RECEIPT,
guardian may give, for legacy to infant, 83
power to give, 376
whether agent can give, *ib.*
gift over, upon death before, 567—568
on death before actual, 568

RECEIPT CLAUSE,
effect of, on estates of trustees, 358, 359
in creating separate use, 512, 513
in creating restraint upon anticipation, 516, 517

RECEIVED, RECEIVABLE,
meaning of, 565 (see RECEIPT)

RECITAL,
effect of, in excluding property from residue, 193
does not execute power, 205
implication by (see IMPLICATION), 613
incorrect, of gift, will not cut it down, 617
of advance, effect of, 634

RECONVEY,
unlimited covenant to, is void for remoteness, 475

REDEEM,
right of tenant for life to, 434

REFERENCE,
gifts by, 592—596
 chattels to A. to go according to limitations of realty, vest in A., 592
 chattels to go with a title, *ib.*
 chattels to go as heirlooms with realty, *ib.*
 chattels do not vest in tenant in tail, defeasible by birth of issue to take under prior limitations, 593
 direction against vesting under twenty-one, *ib.*
 direction as to possession, *ib.*
 proviso divesting estate must not be uncertain, 594
 whether words "as far as the law permits" will carry on chattels directed not to vest in a tenant in tail dying under twenty-one, *ib.*
 possession under deed not executed, *ib.*
 bequest in the same manner as prior gifts, *ib.*, 595
 whether gift upon trusts of a prior gift is subject to same charges as the prior gift, 595, 596
 gift to persons "before named," 596
 gift to persons "hereafter named," *ib.*
 what is a sufficient, to a power, 204—206
 to property subject to a power, 206—208

REFERENTIAL CONSTRUCTION,
of gifts in default of issue, 577—582
(See DEATH WITHOUT ISSUE.)

REIMBURSEMENT CLAUSE,
effect of, on gift of residue to executors, 294

RELATIONS,
gifts to, 271—273
 restricted to persons capable of taking by statute, 271
 they take *per capita* as joint tenants, *ib.*
 power to select relations extends to all relations, *ib.*
 when the class to take is ascertained, 272, 273
 poor relations, gifts to, whether charitable, 302
 precatory trust for, 400

RELEASE,
condition requiring, construction of, 502, 503

RELIGION
of children, directions as to, in will, 85
gift over on change of, valid, 497

RELIGIOUS PURPOSES,
gifts for, 295, 296

REMAINDERS,
(See **LIMITATIONS, EXECUTORY INTERESTS, CONTINGENT REMAINDERS**).
distinguished from executory interests, 520—522
when they are void for remoteness, 476, 477
contingent (see **VESTING**), 260, 261, 452—458
in chattels, 518
after absolute interest, *ib.*, 519

REMAINS,
gift of what remains, 420, 519

REMOTENESS,
(See **PERPETUITY**), 475—489

REMOVAL,
effect of, on bequest of things in a house, 130

RENEWABLE LEASEHOLDS. (See **LEASEHOLDS, RENEWABLE.**)

RENEWAL,
fines for, apportionment of, between successive takers, 437, 438
fund for, right to, as between tenant for life and remainderman, 438, 439

RENT CHARGE,
devise of, is specific, 118
devisee of, entitled to redemption money, 217
distinguished from an annuity, 409
what words create, *ib.*
charged on realty and personalty issues out of realty, 410
whether it can be entailed, *ib.*
tenant for life must keep down, 432, 433
effect of Intestates Estates Act on, 650
when it has priority over legacies charged on land, 659
whether devise of, charges real estate, 409

RENTS, RENTS AND PROFITS,
due after death, payable by specific legatee, 134
from death pass to devisee, 143
accumulated rents of mines held to pass under devise of surface, 169
devise of, when it passes the fee, 340
 effect of, on specific enjoyment, 445
increase in value of, given to charity, 308, 309
when within Mortmain Act, 314, 317
direction not to raise, void, 505
apportionment of, 144, 145
power to raise sum out of, authorises sale, 674, 675
intermediate, 145—148
 of contingent devises pass to heir or residuary devisee, 145
 specific bequest fall into residue, 146
 residuary devise pass to heir, *ib.*
 bequest go with residue, *ib.*
mixed fund of residue carries, *ib.*, 147
where fund is given to a class, 147, 148
right of devisee to, between death and sale of land converted by testator, 217
who entitled to, between shifting and birth of issue to take, 590

REPAIR,

- power of trustees to, 380, 381
- when trustees bound to, 430, 431
- when tenant for life bound to, *ib.*
- trust to, not within Thellusson Act, 490

REPRESENTATIVES,

- meaning of,
 - where used as a word of purchase, 289—291
 - gift to descendants or representatives, 270
 - primâ facie* means executors, 289
 - where it means next of kin, *ib.*
 - substitutional gift to, *ib.*
 - may mean descendants, 290
 - substitutional gifts to, after a life estate, *ib.*
 - effect of words of distribution, *ib.*
 - use of executors in other parts of the will, *ib.*, 291
 - direction to pay to, where executors are named, 291
 - explained by other words, *ib.*
- where used as a word of limitation, 390

REPUBLICATION,

- distinguished from revival, 60
- what reference required to republish, *ib.*
- effect of, on specific devise, 106, 107
- from what date republished will speaks, 107

REPUGNANT CONDITION

(See **CONDITION**), 503—517

REPUTATION

- of parentage of illegitimate child, 245, 246

REQUEST,

- conversion upon, 210

RESIDENCE,

- condition requiring, 172, 173, 503

RESIDUARY DEVISE (see **GENERAL DEVISE),**

- is specific, 117

RESIDUARY LEGATEE,

- effect of appointment of, 167, 168, 211—213
- “of all my property,” appointment of, 167
- who omits legacies in preparing will may be declared trustee, 23

RESIDUE,

- gift of,
 - what is, 186—191
 - enumeration of particulars in, 187—191
 - when specific, 118—120, 192
 - contingent, when it passes interest, 146
 - when it passes under word money, 159, 160
 - when it executes general power, 195—202
 - when it executes special power, 207
- what passes under gift of, 191—195
 - of appointed fund, 191
 - after payment of legacies, *ib.*

RESIDUE—continued.

- of particular part of testator's property, 192
- of lands in A., *ib.*
- of personal fund, *ib.*
- general and particular, *ib.*
- general, what it passes, *ib.*, 193
- intention to exclude certain property, *ib.*
- restrictive words, *ib.*
- small remainder, *ib.*
- property excepted from, *ib.*, 194
- residue of residue, 194
- revocation of share of, *ib.*
- residue given in proportion to legacies, 194
- share of residue to fall into residue, 195
- accumulations released by statute, 494
- questions between real and personal residue, 202, 203
- conversion of, between tenant for life and remainderman, 442—446
- gift of, to executors, whether beneficial or in trust, 293, 294
- vesting of, argument in favour of, 465, 467
- whether it is a legacy, 168, 169
- two gifts of, in same will, effect of, 618
- gifts of remainder and, in same will, *ib.*
- of a particular fund, gift of, where void for uncertainty, 623
- undisposed of, passes to next of kin, 651
 - what is a contrary intention, *ib.*, 652
 - when there are no next of kin the executors take, 652
 - (See EXECUTORS.)
 - whether primarily liable for payment of debts, 656
 - lapsed share of residue whether applicable before shares well disposed of, 657
- what is, as between tenant for life and remainderman, 446—449

RESPECTIVE,

- distributive force of the word, 252
- devise to several and heirs of their respective bodies, 329
 - and their respective heirs, *ib.*, 330
- bequest to several and their respective executors, *ib.*, *ib.*

REST,

- gift of all the, passes realty, 177

RESTRAINT UPON ANTICIPATION, 514—517. (See ANTICIPATION, RESTRAINT ON.)**RESTRICTION**

- as affecting description of property, 108, 109
- effect of, on prior absolute interest, 396, 397
- invalid when it may be rejected, 487

RESULTING TRUSTS, 397, 645—647

- devise subject to a charge which fails carries the whole, 645
- in what cases the devisee takes subject to the charge or only what remains after satisfying the charge, 646
- direction to pay a certain sum, *ib.*
- direction to raise a sum disposed of in all events, *ib.*
 - for purpose which may fail, *ib.*
- charge created by will and by a prior instrument, 646
- devise subject to, and upon trusts, *ib.*, 647
- exception of property out of a devise, 105

RETAINER, 132—134

- right of, against specific legatees, 132
- against general legacy, 133
- in case of bankrupt legatee, *ib.*
- where debt due from husband of legatee, *ib.*
- where debt due to executor, 134

REVERSION,

- married woman cannot elect in respect of, 90
- whether it passes under general words, 179—181
- acquisition of, in leaseholds given by the will, 130, 131, 132
- interest upon legacy charged upon, 150
- devise of, in default of issue, when it refers to failure of subsisting estates, 586, 587
- power of sale over, when exercisable, 369
- purchase of, by tenant for life, of leaseholds, 436
- must be converted as between tenant for life and remainderman, 443, 448
- apportionment on sale of, 449

REVIVAL OF WILL, 57—60

- revoking will revoked, 57
- by codicil, 57—60

REVOCATION, 35—47, 614—617

- covenant not to revoke, 13
- by marriage, 35
- of will under power, *ib.*
- alteration of circumstances, 36
- during insanity, *ib.*
- destruction, *ib.*
- dependent relative, 37—41
- several inconsistent instruments, 41, 42
- description as last will, 42
- clause of, *ib.*
- codicil reviving revoked will, *ib.*
- by acts, 44—46
- destruction of duplicate, 46
- of will of soldier or seaman, 55, 56
- of trustee appointed by will, 357
- by change of interest, 130—132
- of share of residue, effect of, 194
- and new appointment, power of, not exercised by general bequest, 202
- of appointment under special power, power of, how exercised, 208
- by alteration of estate, 614
- effect of section 23 of the Wills Act, *ib.*
- it must be reasonably clear that a bequest was meant to be revoked, 615
- gift to A. for life with remainders, with revocation of gift to A., *ib.*
- whether revocation revokes executory gifts over, *ib.*
- gifts will not be revoked further than is necessary, 616
- of devise subject to a charge, *ib.*
- revoked legacy not set up because the attempted disposition fails, 40, 616
- of devise of realty when personalty is given upon trusts of realty, 616
- erroneous recital will not effect, 617
- erroneous assumption of fact will not effect, *ib.*
- (See **INCONSISTENCY, 617—619.**)
- effect of, of share of a member of a class, 644

- RIGHT HEIRS MALE,
devise to, 277
- RIGHT OF WAY, RIGHT OF LIGHT,
when they pass under a devise, 173
- RIGHT TO SUE
in testator's name not devisable, 75
- RIGHTS AND CREDITS
may pass personalty, 163
- ROMAN CATHOLICS,
position of, as regards charitable gifts, 299, 300, 301
roman catholic ecclesiastic may be guardian, 83
- ROYALTY
on minerals, not within Mortmain Act, 317

S.

- SAID,
effect of the word in substitutional gifts, 543
- SALE,
effect of, by testator upon thing specifically given, 111
contract for, converts, 215, 216
under compulsory powers converts, 218, 219
under decree converts, *ib.*
power of, 364—375
and exchange authorises partition, 364
whether authorises mortgage, *ib.*
severance of minerals, *ib.*
extends to purchased lands, *ib.*, 365
at death of tenant for life not exercisable before, 365
within limited time, *ib.*
when it survives, 365, 366, 367
distinguished from trust, 365
direction to executors to sell, *ib.*
bare power whether it survives, 367
given to named persons, *ib.*
executor of executor cannot exercise, *ib.*
whether infant can consent to exercise of, 368
consent of tenant for life after alienation, *ib.*
bankruptcy, *ib.*
with consent, how exercisable, 369
over reversion, *ib.*
future sale under, bad, *ib.*
several estates together, *ib.*
when spent, 370
when trustees compelled to exercise, 371
whether suspended by administration action, *ib.*, 372
where persons to exercise not named, 372
when implied from charge of debts, 372—375
over personalty, executors have, 376
effect of, on estates of trustees, 360
whether it can be too remote, 479
whether included in usual powers, 602
gift over on death before completion of, whether valid, 569
whether power to raise out of income authorises, 674, 675

SALVAGE

expenditure in nature of, by tenant for life, 432

SAME

effect of gifts in same manner as prior gifts, 594, 595

SANITY,

not presumed, 14

SATISFACTION, 624—631

of portions by legacies,

arises between a gift and a liability to give, 624

distinguished from ademption, *ib.*, 625

covenant to settle for life and absolute bequest, 625

effect of some legacies being expressly in, *ib.*

effect of difference between covenant and bequest, *ib.*

land and money, *ib.*, 626

portion and residue, 626

contingent legacy and vested portion, *ib.*

what difference between covenant and will rebuts, *ib.*, 627

effect of a direction to pay debts, 627, 628

in the case of strangers,

only arises by express declaration, 628

whether provision by will is advancement in legatee's life,
ib., 629

of debts by legacies,

legacy of equal or greater amount satisfies a debt, 629

what debts may be satisfied, *ib.*, 630

what legacies will work, 630

effect of difference between the nature of the debt and legacy,
ib., 631

effect of direction to pay debts and legacies, 631

debts only, *ib.*

where documents are contemporaneous, *ib.*

SAVINGS

of separate estate are separate estate, 17

SCANDALOUS PASSAGES,

when omitted from probate, 23

SCHEME,

when court directs, for charity, 309, 310

SCHOOLHOUSE,

land may be devised for, 323

SCIENCE,

gifts for advancement of, are charitable, 295

SCIENCE AND ART DEPARTMENT,

land may be devised to, 323

SCOTCH CONFIRMATION,

effect of, 70

SEAL

not sufficient signature, 24

SEAMEN,

wills of, 48—56

SECOND

- son, gift to, 232, 233
- and other sons may include first son, 237

SECOND COUSINS,

- meaning of, 266

SECRET TRUST,

- evidence of, when admitted, 65, 66
- for charity, 322, 324
- whether the legal estate passes, 324

SECURE,

- direction to, does not create tenancy in common, 333

SECURITIES,

- power to invest in, 379

SECURITIES FOR MONEY,

- what passes under, 162, 163
- whether it passes legal estate, *ib.*, *ib.*

SEISED,

- meaning of, 177, 593

SELECTION,

- when legatee has a right of, 109, 110

SELL,

- condition not to, when valid, 504

SEPARATE USE, 510—514

- effect of, on gift to mother and children, 326, 327
 - on estates of trustees, 358, 362
 - Married Women's Property Act on, 510, 511
- corpus as well as income may be given to, 511
- effect of, on curtesy, *ib.*, 512
 - on husband's rights in undisposed of personalty, 512
- what words create, *ib.*
- "own use," "absolute use," "proper hands," *ib.*
- "own disposal," where legatee is married, *ib.*
- "separate receipt," *ib.*, 513
- gift for maintenance and support, 513
- "sole use" does not *primā facie*, *ib.*
- it may when assisted, *ib.*, 514
- when direction to settle imports, 599
- settlement to the, will be without power of anticipation, 602

SEPARATION,

- conditions encouraging, are invalid, 497

SERVANTS,

- gifts to, 227, 228

SETTLE,

- direction to,
 - effect of, on gift to parent and children, 328
 - on joint tenancy, 333
- will not prevent lapse where an absolute interest is given in the first place, 541

SETTLE—*continued*.

- direction to, when confined to life of a tenant for life, 532
- distinguished from substitutional gift, 541
- how carried out by the Court, 600—602
- what powers it will authorise, 602

SETTLEMENT,

- voluntary, is not testamentary, 10

SEVERAL INHERITANCES

- and joint life interests, 329, 330

SEVERANCE

- of joint tenancy (see JOINT TENANCY), 330—332
- of income of joint property as it accrues, 332
- effect of, upon vesting, 464
 - in carrying interest, 153
- of shares of members of a class, which is too remote, 483, 484
- words of, as creating tenancy in common, 334
- of minerals, when authorised by power of sale, 364

SHARE.

- bequest of share under will, how adeemed, 128, 129
- devise of, will pass the fee, 338
- when it creates a tenancy in common, 332
- will not pass accrued shares, 536, 537
- effect of direction to settle, 643

SHARES,

- calls upon, when payable by legatee, 135
- bonus on, when it passes, 144
- when within Mortmain Act, 314, 315
- railway, include stock, 164
- mining, *ib.*
- when they should be sold, 377

SHELLEY'S CASE,

- rule in, 347—356
- in the case of realty :
 - limitation to heirs coalesces with life estate of the ancestor, 347
 - the two limitations must be in the same instrument, *ib.*
 - applies to freeholds, copyholds, and estates *pur autre vie*, *ib.*
 - applies where both limitations are legal or equitable, *ib.*
 - does not apply where one limitation is legal the other equitable, 348
 - does not apply so as to destroy intermediate contingent limitations, *ib.*
 - does not apply where the limitation to the heir is an executory devise, *ib.*
- application of, where the limitation is to heirs or heirs of the body, 348—353
 - applies though estate of the ancestor expressly limited for life, 348, 349
 - words of limitation superadded to the heirs are immaterial, 349
 - words of distribution superadded to the heirs are immaterial, *ib.*, 350
 - gavelkind lands follow same rule, 350
 - gift over in default of issue is immaterial, *ib.*

SHELLEY'S CASE—continued.

- words of limitation and distribution superadded are immaterial, *ib.*, 351
- words of limitation superadded inconsistent with the course of descent, 351, 352
- heirs explained to mean children, 352, 353
- application of, when the limitation is to first heirs male, or heirs of the body who attain twenty-one, 353
- application of, where the limitation is to the heir, *ib.*, 354
 - next or first heir, 353
 - limitation to the heir for ever, *ib.*
 - words of limitation superadded, *ib.*
 - where the estate of the heir is for life, 354
- application of, where the limitation is to issue, 354—356
 - distinction between issue and heirs, 354
 - effect of words of distribution superadded, *ib.*, 355
 - whether a gift over in default of issue is material, 355
 - effect of words of limitation superadded, *ib.*
 - whether the absence of a gift over is material, *ib.*
 - words altering the course of descent, *ib.*
 - words of limitation and distribution superadded, *ib.*, 356
 - effect of the Wills Act, 356
 - effect of a direction against alienation, *ib.*
- in the case of personalty, 391—394
 - when the limitation is to the heirs of the tenant for life, 391
 - effect of words of distribution, 392
 - when the limitation is to the issue of the tenant for life, 392, 393
 - what will convert issue into a word of purchase, 393
- when realty and personalty are given together, 392, 393, 394
- the rule applies to rent charges, 410
- how far it applies to executory trusts, 598

SHIFTING CLAUSES, 588—591

- operate upon a life interest though it comes into possession upon the event on which the estate is to shift, 588
- possession of settled estates means possession under settlement, *ib.*
- meaning of "entitled," *ib.*
- meaning of "possession," 589
- where the devisee takes under a re-settlement, *ib.*
- whether they take effect on estates in remainder, *ib.*
- repeated operation of, *ib.*
- will not avoid jointures and portions properly charged, *ib.*
- when estates under, go to trustees to preserve, *ib.*, 590
- who is entitled to intermediate rents, 590
- estates directed to shift as if devisee were dead without issue, *ib.*, 591

SIGNATURE

- of testator to will, 24—28
 - mark, 24
 - assumed name, *ib.*
 - seal, *ib.*
 - dry pen, *ib.*
 - by agent, *ib.*
 - how connected with will, 25
 - position of, *ib.*, 26
 - words under, 26

SIGNATURE—*continued*.

of testator to will, attestation of, 26, 27
acknowledgment of, 27, 28
tearing off, 44, 45

SMALL BALANCE,

gift of, what it passes, 193

SMALL REMAINDER,

what it passes, 193

SOLDIERS,

wills of, 48—56

SOLE,

when it creates a separate use, 513, 514
use and benefit, effect of, 402

SOLICITOR,

appointment of, how far binding, 85, 86
cannot charge profit-costs when witness of will, 100
when he can receive purchase money, 376

SON,

gift to A., second son of B., when he is the first, 225, 226
“a,” construction of, 231
a first or second, 232, 233
when used as a word of limitation, 344, 345

SPECIAL POWERS,

execution of, 204—208
not within sects. 25 or 27 of the Wills Act, 204
must be reference to power or property, *ib.*
what is reference to power, *ib.*, 205, 206
beneficial power, 205
disposing power, *ib.*
gift in excess of power, *ib.*
gift to non-objects, *ib.*
trust to pay debts, *ib.*, 206
what is reference to property, 206, 207
when residuary gift executes power, 207
power exercisable by survivor, *ib.*, 208
execution of power of revocation, 208
who should administer appointed fund, *ib.*
limitations created by, when read into original settlement, 370

SPECIFIC ENJOYMENT

of residue, when tenant for life entitled to, 443—446

SPECIFIC ENUMERATION OF THINGS

in residuary gift, effect of, 187—189
effect of, on specific enjoyment by tenant for life, 444, 445

SPECIFIC GIFT,

description of, 109
increase of value of, *ib.*, 110
inaccurate description, 110

SPECIFIC GIFT—continued.

- sale of, before date of will, *ib.*, 111
- sale and re-purchase, 111
- confirmation by codicil, effect on, *ib.*
- carries profits, 143
- what is a,
 - gift of stock in round numbers, 112
 - gift of stock on trust to sell is specific, 113
 - rest of "my" stock makes prior gifts specific, *ib.*
 - stock not in round numbers, *ib.*, 114
 - "my" stock, 114
 - effect of the Wills Act, *ib.*
 - gift of part of a specific fund, *ib.*
 - money out of money, *ib.*
 - whether a gift is money out of money, or money out of stock, 115
 - whether necessarily subject to ademption, *ib.*
 - gift of a sum "invested" in a particular way, 116
 - legacy in intended exercise of power, 117
 - and gift of aliquot part of a fund, distinction between, *ib.*
 - gift of a sum payable out of real estate, *ib.*, 118
 - effect of directions in the will on a, 118
- whether a gift is specific or residuary, 118—120
- when a gift of residue of a specific fund is specific, 120—121
- ademption of (see **ADEPTION**), 127—130
- change of testator's interest in, 130—132
- retainer against, 132—134
- exoneration of (see **EXONERATION**), 134, 135

STATUTE OF DISTRIBUTIONS,

- effect of reference to, 282, 283
- fixes proportions in gifts to heirs or representatives, 281, 289

STATUTES CITED,

- 21 Hen. VIII. c. 4 (Executor's power of sale), 366
- 23 Hen. VIII. c. 10 (Superstitious Uses), 300
- 27 Hen. VIII. c. 16 (Bargain and Sale), 366
- 32 Hen. VIII. c. 1 (Wills), 98
- 34 & 35 Hen. VIII. c. 5 (Wills), 98
- 1 Edw. VI. c. 14 (Superstitious Uses), 300
- 43 Eliz. c. 4 (Charitable Uses), 98, 295, 301, 321
- 12 Car. II. c. 24 (Guardians), 82, 83
- 29 Car. II. c. 3 (Statute of Frauds), 48
- 1 Will. & M. c. 18 (Dissenters), 299
- 4 Geo. II. c. 28 (Right to Distrain), 409
- 9 Geo. II. c. 36 (Mortmain), 312, 321
- 36 Geo. III. c. 52 (Legacy Duty), 83
- 39 & 40 Geo. III. c. 98 (Thellusson), 489
- 42 Geo. III. c. 116 (Land Tax Redemption), 322
- 43 Geo. III. c. 108 (Church Building), 298, 322, 323
- 55 Geo. III. c. 192 (Devise of Copyholds), 181
- 10 Geo. IV. c. 7 (Monastic Orders), 300
- 11 Geo. IV. & 1 Will. IV. c. 40 (Residue, Executors), 294, 651
- 2 & 3 Will. IV. c. 75 (Anatomy), 78, 79
- 2 & 3 Will. IV. c. 115 (Roman Catholics), 299, 300
- 1 Vict. c. 26 (Wills Act) (see **WILLS ACT**)
- 6 & 7 Vict. c. 37 (Endowment of Districts), 323
- 8 & 9 Vict. c. 18 (Lands Clauses), 449
- 8 & 9 Vict. c. 106 (Merger), 348

STATUTES CITED—*continued.*

- 9 & 10 Vict. c. 59 (Jews), 299
- 12 & 13 Vict. c. 26 (Leases), 380
- 13 & 14 Vict. c. 17 (Leases), 380
- 15 & 16 Vict. c. 24 (Wills Act Amendment), 25
- 16 & 17 Vict. c. 70 (Lunacy), 127
- 17 & 18 Vict. c. 113 (Locke King), 135, 136, 137
- 20 & 21 Vict. c. 57 (Malins' Act), 133
- 22 & 23 Vict. c. 35 (Charge of Debts, Receipts), 372, 373, 375
- 23 & 24 Vict. c. 134 (Roman Catholic Charities), 301
- 23 & 24 Vict. c. 145 (Mortgagees' Powers, Maintenance), 149, 153, 378, 384
- 24 & 25 Vict. c. 114 (Domicile), 2
- 24 & 25 Vict. c. 121 (Domicile), 9
- 28 & 29 Vict. c. 72 (Navy and Marines (Wills)), 48—51
- 30 & 31 Vict. c. 69 (Locke King Amendment), 135, 137
- 32 & 33 Vict. c. 71 (Bankruptcy), 474
- 33 Vict. c. 14 (Aliens), 3, 19, 99
- 33 & 34 Vict. c. 23 (Forfeiture), 20, 99
- 33 & 34 Vict. c. 35 (Apportionment), 144
- 36 & 37 Vict. c. 66 (Judicature), 409
- 38 & 39 Vict. c. 68 (Science and Art), 323
- 40 & 41 Vict. c. 33 (Contingent Remainders), 261, 521
- 40 & 41 Vict. c. 34 (Locke King Amendment), 135, 137, 138, 218
- 42 & 43 Vict. c. 59 (Outlawry), 20, 99
- 44 & 45 Vict. c. 41 (Conveyancing Act), s. 10, 531
 - s. 19, 375
 - s. 30, 77, 162, 184
 - s. 42, 380, 381
 - s. 43, 148, 153, 384
- 45 & 46 Vict. c. 38 (Settled Land), 173, 380, 428, 429, 449, 503, 504, 505
- 45 & 46 Vict. c. 39 (Conveyancing), 366, 531
- 45 & 46 Vict. c. 73 (Ancient Monuments), 323
- 45 & 46 Vict. c. 75 (Married Women's Property), 15, 335, 510, 511, 663
- 47 & 48 Vict. c. 71 (Intestates' Estates), 649
- 49 & 50 Vict. c. 27 (Guardianship of Infants), 84, 85
- 50 & 51 Vict. c. 73 (Copyhold), 184
- 51 & 52 Vict. c. 42 (Mortmain and Charitable Uses), 311, 321, 323
- 53 Vict. c. 5 (Lunacy), 127
- 53 & 54 Vict. c. 29 (Intestates), 648
- 53 & 54 Vict. c. 69 (Settled Land), 380
- 54 & 55 Vict. c. 73 (Mortmain and Charitable Uses), 310, 311
- 55 & 56 Vict. c. 58 (Accumulations), 489
- 56 & 57 Vict. c. 53 (Trustee), s. 1, 378, 388
 - s. 3, 378
 - s. 5, 378, 379
 - s. 17, 376
 - s. 18, 381
 - s. 19, 381
 - s. 20, 376
 - s. 21, 378
 - s. 22, 366
 - s. 44, 364
 - s. 50, 366
- 56 & 57 Vict. c. 63 (Married Women's Property), 15, 517
- 57 & 58 Vict. c. 46 (Copyhold), 184

STATUTORY POWERS,
effect of sale under, 218

STIRPES,
when distribution will be by (see **DISTRIBUTION**), 251—254
gift to personal representatives *per*, 291
when survivorship will be referred to, 550—554. See **SURVIVORS**.
when a gift to persons then living will be referred to, 473

STOCK,
gifts of, when specific, 112, 113
when it will pass as money, 158, 160
farming, gift of, 166
live and dead, gift of, *ib.*
in trade, gift of, 167
in trade, may be limited for life, 518

STRICT
entail, direction to make, effect of, 598
settlement, direction to make, 600, 601, 602

SUBJECT TO,
gift subject to trusts, 401
gift of capital subject to annuities, 417

SUBSTITUTION, SUBSTITUTIONAL GIFTS, 539—548
of personalty to heirs, 280, 281
to representatives, 289, 290
to executors, 292
whether a gift to A. or his executors fails by lapse, *ib.*
do not take effect if substituted legatees fail, 525, 526
whether gift to A. or B. is, 539
gift to A. or B. as C. may appoint, *ib.*
children, grandchildren, or other descendants, *ib.*
when both original and substituted legatees must be living at
time of distribution, *ib.*
when "or" will be changed into "and," *ib.*, 540
gifts to persons then living, or their issue, 540
distinguished from gift over at any time, *ib.*
absolute gift with direction to settle, 541
direct gift to A. or his children, *ib.*
gift after a life interest to A. or his children, *ib.*
whether substituted legatees can take for original legatees who
die in testator's life, *ib.*
where the original gift confined to persons living at the death, *ib.*
whether there can be, in respect of legatees dead at date of will,
542—545
where the original gift is to named persons, 542
a class, *ib.*
substituted legatees take original shares, *ib.*
gifts to parents then living and issue of those dead, *ib.*, 543
parents then living and children of such of *said*
parents as shall be then dead, 543
gift to my daughters and their children, *ib.*
a class or their issue, *ib.*
where original legatees living at date of will do not satisfy
the words, *ib.*, 544
gift to substituted legatees in an independent clause, 544
direction that the legacy of a parent is to go to children, *ib.*

SUBSTITUTION, SUBSTITUTIONAL GIFTS—*continued.*

- issue to stand in place of parent, 544
 - take share the parent would have been entitled to, *ib.*, 545
- whether contingency attaching to original extends to substituted legatees, 545—547
 - in the case of original shares, 545
 - substitutional shares, 546
 - whether substituted legatees must survive ancestor, *ib.*
- whether original and substituted classes are mutually exclusive, 547
 - where all original legatees survive, 547
 - where none survive, *ib.*
 - where some survive, *ib.*
- when the class of substituted legatees is ascertained, *ib.*, 548
- whether substituted legatees take *per stirpes* or *per capita*, 253, 254
- issue substituted for parent take jointly, 333, 334

SUBSTITUTIONAL LEGACIES, 122—126. See CUMULATIVE LEGACIES.

SUCCESSION,

- gift to sons of A. in, 336

SUCCESSION DUTY

- not covered by words "free from legacy duty," 155

SUCCESSIVE AND JOINT INTERESTS (see PARENT AND CHILDREN), 325—328

SUCCESSIVE MORTGAGES

- for same debt, incidence of, as between devisees, 142, 143

SUCCESSIVELY,

- devise to several and their heirs, creates estates tail, 336
- absolute interests cannot be given, 518—520

SUCH

- child, when restricts heirs, 352
- force of, 469
- when it may be rejected, 470
- construction of, in gifts over in default of such issue, 577—579

SUCH AS,

- restrictive effect on large words, 187

SUFFER,

- effect of, in gift over, 508

SUGGESTIONS

- for preparing wills, 680—682

SUICIDE,

- testamentary capacity of, 19, 20

SUPERSTITIOUS USES,

- what are, 300, 301

SUPPLYING WORDS, 621, 622

general rule as to, 621

limitation to second and other sons supplied, *ib.*

daughters supplied in a settlement, *ib.*

where limitation is to daughters who marry under twenty-one, *ib.*

words without issue supplied so as not to divest estates tail, 622

in direction that estates are to determine as if the tenant in tail were dead, 506

without children supplied so as not to divest vested gifts, 622

SUPPORT,

gift to support school, valid, 318

SURFACE,

devise of, whether it passes rents of mines, 169

SURRENDER

of copyholds, no longer necessary, 74, 181

SURVIVE,

gift to children who survive me, 248

next of kin of wife as if she had survived her husband, 288

meaning of, 549

gift to children who survive their parent, 460, 469—473

SURVIVOR

of two persons, power given to, when exercisable during lives of both, 75, 76, 200, 207

limitation to, effect in creating joint tenancy, 330

of class, whether he can consent, 369

SURVIVORS, 549—561

substitutional gift to, does not divest prior gift if there are no survivors, 525, 526

gift over to, effect of, in limiting period of defeasibility, 532

when the word is used as denoting the quantity of the estate, 549
meaning of, *ib.*

a single survivor may take under a gift to, *ib.*

when survivors will be construed others, 549—554

gifts to several, and if any die without issue, to survivors, 549, 550

to be paid at twenty-one, and if any die under twenty-one, to survivors, with gift over, 550

survivorship between tenants in tail referred to *stirpes*, *ib.*

gifts for life and then to children, if any die without children, to survivors for life, and then to their children, 561

whether gift over is necessary, *ib.*, 562

gift to "others surviving," 552

over after death of survivor, *ib.*

to survivors not subject to limitations of original shares, *ib.*

general intention to benefit *stirpes*, *ib.*

gifts for life and then in tail, gifts to survivors in tail, 553

where some shares are settled others not, *ib.*

SURVIVORS—*continued.*

- gift to survivors subject to same defeasibility as original shares, *ib.*, 554
- when gifts to, cease to operate, 554—557
 - period of distribution is limit of defeasibility, 554
 - whether only gift is in direction to pay or not, *ib.*
 - same rule applies to realty, *ib.*
 - direct gift to several or survivors, 555
 - payment postponed, *ib.*
 - after a life interest, *ib.*
 - gift upon a contingency to survivors, *ib.*
 - to a surviving class, *ib.*
 - what is a contrary intention, *ib.*
 - effect of powers of advancement, 556
 - words of limitation, *ib.*
 - gifts to be paid at twenty-one, with benefit of survivorship, *ib.*
 - effect of gift over upon death of all under twenty-one, *ib.*
 - before tenant for life, 557
 - gifts to survivors upon death without issue, *ib.*
- when the class of, is to be ascertained, 557—561
 - where the gift is upon death without issue, 557
 - last survivor does not take indefeasibly, *ib.*, 558
 - whether the class is to be ascertained when the event happens, or when the shares become indefeasible, 558
- when there is no vested gift, 558
 - divesting gift to survivors upon death merely, *ib.*
 - direct gift to be paid at twenty-one, and if any die under twenty-one, to survivors, *ib.*, 559
 - gift after a life interest, and if any die before tenant for life, to survivors, 559
- when survivorship is intended between the legatees, *ib.*
 - gift to survivors if any die without issue before the period of distribution, *ib.*
 - when there is a gift to issue if any die leaving issue, *ib.*, 560
 - the original gift is to persons living at the time of distribution, 560
 - there is an intention to divide the whole among persons capable of personal enjoyment, *ib.*
 - general principle, *ib.*, 561
 - when the period of defeasibility is constructively limited, 561
- gifts to, in default of issue, 585, 586

SURVIVORSHIP

- of powers and trusts, 366—368
- implication of, between annuitants, 420—422
 - gift of annuity to two persons for their lives, 420
 - as tenants in common for their lives, 421
 - effect of gift over after the death of the survivor, *ib.*, 422
- gift with benefit of, passes accrued shares, 479
- of power of sale, 365—367

SYMBOLS,

- evidence to explain, 102

T.

TAIL (see ESTATE TAIL), 341—347

TENANCY BY ENTIRETIES, 334, 335

TENANCY IN COMMON (see JOINT TENANCY), 332—334

TENANT BY CURTESY (see CURTESY)
is impeachable for waste, 424

TENANT FOR LIFE,
when made unimpeachable for waste, in executing executory trust
602

TENANT FOR LIFE AND REMAINDERMAN, 419—449
creation of life estates, 419, 420
devise without words of limitation before Wills Act, 419
successive life estates not enlarged, *ib.*
effect of gift over at death of first taker, *ib.*, 420
gift of what remains or is undisposed of, 420
devise to A. for his life and the life of his heir, *ib.*
gifts to several for their lives, 420—422
devise to A. and B. for their lives, 420
for a term if B. and C. so long live, *ib.*
direction to purchase annuity for lives of A. and B., *ib.*,
421
gift of annuity to A. and B. during their joint lives and the
life of the survivor, 421
when the survivor takes the whole income, *ib.*
effect of gift over on survivorship, *ib.*, 422
provisions determining life interests, 422, 423
direction not to alienate is void, 422
proviso for ceaser is good, *ib.*
gift over on bankruptcy, *ib.*, 423
effect of, on power of appointment, 423
waste (see WASTE), 423—431
emblements, 431
right of executor of tenant for life to, 431
fixtures, 431
tenant for life cannot sever, 431
improvements by tenant for life, 432
he improves at his own risk, 432
except in case of salvage, *ib.*
charges and incumbrances, 432—435
rentcharges and annuities, 432, 433, see 412
interest on mortgages, 433, 434
ordinary outgoings, 434
redemption of incumbrances, 434, 435
powers of leasing, 435
covenant to renew lease, 435
fiduciary position, 435—437
purchase of incumbrance at under-value, 436
payment for withdrawing opposition to bill, *ib.*

TENANT FOR LIFE AND REMAINDERMAN—continued.

- renews leaseholds for benefit of estate, 436
- purchases reversion for benefit of estate, *ib.*
- may purchase estate if sold under power, *ib.*
- right to policy moneys, 437
- settlement by testator who has no title, *ib.*
- renewable leaseholds, 437—439
 - effect of direction to renew, 437
 - apportionment in absence of direction, 438
 - title to fund for renewal, where renewal impossible, *ib.*, 439
- right to possession, 439
 - must sign inventory of chattels, 439
- right to title deeds, 439, 440
 - legal tenant for life, 439
 - equitable tenant for life, 440
- capital and income, 440—442
 - trees blown down during testator's life, 440
 - finer and casual profits, *ib.*
 - accumulations during minority, *ib.*
 - dividends on shares, *ib.*
 - partnership profits, *ib.*
 - debts, *ib.*
 - fund for protection of property, 441
 - business losses, *ib.*
 - accumulated profits of trading companies, *ib.*
 - dividends and bonuses, *ib.*
 - allotment of new shares, 442
 - sale of assets above par, *ib.*
 - income of void accumulations, 494
- residue given to persons in succession, 442—446. See **CONVERSION**.
 - where there is no right to specific enjoyment, 446—449
 - what is residue, 446
 - property properly invested, *ib.*
 - unauthorised securities, 447
 - property which cannot be converted, *ib.*
 - personalty to be laid out in land, *ib.*
 - reversionary property must be sold, 448
 - income of fund to pay future legacies, *ib.*
 - apportionment of recovered assets, *ib.*
 - lost assets, *ib.*
 - loss on insufficient mortgage security *ib.*, 449
 - on sale of reversion, 449
 - leaseholds, *ib.*

TENANT IN DOWER,
impeachable for waste, 424**TENANT IN TAIL,**
after possibility of issue extinct, 343, 424
restrained from barring his estate tail, 424
restricted to tenant in tail by purchase, 485**TENURE,**
effect of reference to, in description, 108**TERM,**
devise subject to, when vested, 442, 443

TESTAMENTARY

- capacity, 14—20
 - sanity, 14
 - delusions, *ib.*
 - lucid interval, 15
 - of infants, 15
 - of married woman, 15—19
 - of alien, 19
 - of traitors, felons, and suicides, *ib.*, 20
 - of outlaw, 20
- expenses, what are, 665
 - do not include costs of administering realty, *ib.*
 - effect of charge of, on realty, 677
- gift, what is a, 10, 11
- guardians, how appointed, 84
- power, what is a, 76, 77
 - how to be executed, 76, 77

THELLUSSON ACT, 489—494 (see ACCUMULATION)**THEN,**

- to what period of time referred,
 - in gifts to persons entitled under the statute, 287, 288
 - “then living,” 472, 473
- gift to persons then living, if prior legatee dies, 529
- gifts to persons then living or their issue, 540
- gift to persons then living, on failure of issue, 576, 584

THINGS IN A HOUSE,

- gift of, 130, 165, 166, 190, 191

TIMBER, 423—429 (see WASTE)

- timber estate, what, 426

TIME, COMPUTATION OF,

- in fixing rule against remoteness, 475
- in determining period of accumulation, 490
- as to performance of condition, 498

TITLE,

- reference to, in description, 103
- settlement by testator who has no, 437
- by possession, is devisable, 75
- of honour, gift to peer by his, 227
- of honour, effect of gift of property in support of a, 592
 - executory trust of property in support of a, 599

TITLE DEEDS,

- right to possession of, 439, 440

“TOGETHER WITH,”

- effect of words, in restricting large words, 187
- effect of words, in making the thing so given specific, 11

TOMB,

- gift to build, whether charitable, 298
- gift of surplus to charity after gift to build, 307

TRADE UNION

- cannot take land by devise, 98
- gift to, is not charitable, 296

TRANSFER

of mortgage, trustee may raise costs of, 375, 376

TRANSLATION,

probate of, 70

TRANSMISSIBILITY

of contingent interest, 457

TREES

blown down before testator's death, belong to his estate, 440. (See **TIMBER.**)

TRUST,

parol and secret, evidence of, 64, 65

when it may be devised, 77, 78,

survival of, 366—368

what words create a, 398

precatory words when they create, 398—401

direction to be kind to, remember, provide for certain persons, 399

the property to be subject to the trust must be definite, *ib.*

no trust fixed on what the donee does not dispose of, *ib.*

request to employ a person as manager, 86

the objects of the trust must be definite, 399, 400

precatory words explained by context, 400

what precatory words create a, *ib.*, 401

what interest the donee in, takes, 401—405

gift upon and subject to, 401, 406

gift upon condition, 401

where the whole is given in trust, 402

words of benefit superadded, *ib.*

where the trust arises on death of the donee, 403

when the donee in, is an object of the trust, *ib.*, 404

motive distinguished from, 404

condition distinguished from, 401, 450

and power to sell distinguished, 365

for sale, duration of, 371

when void for remoteness, 480

resulting, 397, 645—647

legacy to benefit legatee in a particular way, 405

discretionary (see **DISCRETIONARY TRUSTS**), 405—408

TRUST ESTATES

vest in executor, 77

when they are devisable, 77, 78

when they pass under general words, 184—186. (See **GENERAL WORDS.**)

TRUSTEES,

when they are executors *secundum tenorem*, 81, 82

annuity given to, for their trouble, 293

of a charity, gift to, whether charitable, 303

liability of, for not converting property, 377

indemnity to, 389

gift of annuity to, duration of, 415

when they take lands devised to them, beneficially, 650

TRUSTEES, ESTATES OF, 357—363

- when they take the legal estate, 357—360
 - appointment of trustees of inheritance, 357
 - revocation of devise to trustee, *ib.*
 - direction to let, *ib.*
 - pay annuities, *ib.*
 - effect of the Statute of Uses, 358
 - devise on trust to pay rents, *ib.*
 - to permit a person to receive rents, *ib.*
 - to permit a person to receive net rents, *ib.*
 - devise to permit a person to receive rents to separate use, *ib.*
 - trust to preserve contingent remainders, *ib.*
 - effect of a power to give receipts, *ib.*, 359
 - trust to pay debts and legacies, 359
 - trust to pay debts out of realty if personalty is insufficient, *ib.*
 - leaseholds for years and copyholds not within the statute, *ib.*
 - appointment under a power to appoint the use, 360
- quantity of, 360—363
 - same rules apply to copyholds, leaseholds, and freeholds, 360
 - devise in fee, with power to sell, *ib.*
 - direction to transfer copyholds, *ib.*
 - power of sale not arising till after a life estate, *ib.*
 - devise without words of limitation, on trust to sell, *ib.*
 - devise in fee till an infant attains twenty-one, *ib.*
 - devise in fee to preserve, 361
 - devise in fee on trust to pay rents for life with remainder, *ib.*
 - effect of leasing power where the devise is in fee, *ib.*
 - effect of remainders to the separate use, 362
 - devise in fee with direction to pay debts, *ib.*
 - mere charge of debts, *ib.*
 - general direction to pay debts where the devise is without words of limitation, *ib.*
 - devise without words of limitation to pay debts, *ib.*
 - effect of the Wills Act on, 363
- when they take a power of sale (see **EXECUTORS**), 372—375
 - distinction between estate and power, 365

TRUSTEES TO PRESERVE,

- estate of, 361, 451
- when estates directed to shift, pass to them, 589, 590

U.**UNCERTAINTY,**

- legacy of uncertain value, 112
- gift to one of a class is void for, 232
 - a family may be void for, 275
- for purposes of liberality and benevolence is void for, 298, 299
- for charitable or other indefinite purposes is void for, 306
- to trustees to dispose of as they think fit, is void for, 406
- of some of my linen is void for, 623
- of a handsome gratuity is void for, *ib.*
- is not void if testator supplies a measure, *ib.*
- of a sum not exceeding a certain amount, *ib.*
- of residue when the residue cannot be ascertained, *ib.*
- in objects of gift, *ib.*

UNDISPOSED OF INTERESTS,

who is entitled to (see **NEXT OF KIN, HEIR, RESULTING TRUST**),
645—655

UNDUE INFLUENCE,

what is, 22

UNIVERSITIES

not within the Mortmain Act, 321

UNMARRIED,

meaning of, in direct gifts, 231
gifts to next of kin of A. as if she had died, 285
gift of income so long as legatee remains, 394
construction of gifts over upon death unmarried and without
issue, 569, 570
unmarried means never having been married, 569
where vested interests are given at twenty-one or marriage, *ib.*
when it may refer to a second marriage, 570
where the gift is for life with remainder to children, *ib.*
in what cases "and" will be changed into "or," 570—572
when unmarried will mean not married at the death, 571, 572

UNSETTLED LANDS,

devise of, what passes under, 179, 180

UPON TRUSTS,

gift, distinguished from gift subject to trusts, 401, 402

USE

of property, testator cannot prevent for a given time, 475
of plate, 173
of book debts, *ib.*

USE AND OCCUPATION

of a house, devise of, 172, 173

V.**VALIDITY**

of will, what necessary to,
testamentary capacity, 14—20
knowledge of contents, 21
influence exercised over testator, 21, 22
undue influence, 22
fraud and mistake, 23
how to be executed, 24—28
attested, 29—31

VALUATION

of annuity, 412, 659
for purposes of ademption, 632

VAULT,

gift to repair, 298

VENTRE, CHILD EN (see CHILD EN VENTRE), 245, 269, 346**VERITAS NOMINIS TOLLIT ERROREM DEMONSTRATIONIS,**

where the maxim applies, 223

VESTED,

meaning of, 459

when it means payable in direct gifts, 460

gifts to children who survive their
parents, 470

VESTING,

I. of real estate, 452—458

general leaning in favour of, 452, 453

if, when, or at, import contingency, 453

distinction between a devise when or if the devisee attains a
given age and a proviso in a distinct sentence, *ib.*

express direction as to, 454

devise to A. till B. attains twenty-one, and then to B.,
ib.

A. for life, and from and after his death to B., if of
age, *ib.*

effect of gift over upon death under twenty-one on prior
contingent devise, *ib.*, 455

devise to contingent class and to class upon contingency, *ib.*,
456

estate to commence in certain events fails unless exact events
happen, *ib.*

where the contingency imports only the determination of
prior interests, *ib.*

limits of the doctrine, *ib.*, 457

contingent interest is transmissible, 457

remainder to arise upon determination of prior estate by
marriage is vested, *ib.*, 458

gift till marriage followed by gift after death, 458

II. of charges on land, 458, 459

legacies charged on land vest when they are payable, 458

payment postponed for purposes of the estate, *ib.*

charge payable upon an uncertain event is contingent, 459

legacy charged upon real and personal estate follows the
rules of that out of which it is paid, *ib.*

III. of bequests of personalty, 459—474

rules apply to chattels real and realty directed to be con-
verted, 459

express direction as to vesting, 459—461

meaning of word "vest," 459

effect of gift over on death before time of vesting, 460

when vested means payable, *ib.*

gift over upon death without issue before vesting, *ib.*

shares treated as vested before the appointed time, *ib.*

vested and paid used interchangeably, *ib.*

direction to pay legacies at a certain time, *ib.*

effect of, where gift is to children who survive their
parent, *ib.*, 461

direction as to beneficial interest, effect of, 461

where there is no direction as to vesting, 461—469

gift to contingent class and class upon a contingency,
461

contingency not imported into gift to a single child, *ib.*

gift with direction to pay at a given age, *ib.*, 462

what is a clear gift, 462

direction to accumulate interest till twenty-one, *ib.*

doubtful cases may be solved by reference to other
limitations, *ib.*

paid may mean vested, *ib.*

VESTING—*continued.*

- gift to be paid at a time which may never come is contingent, *ib.*, 463
- effect of gift of intermediate income, 463
- gift upon marriage construed as gift at twenty-one or upon marriage under twenty-one, *ib.*
- when the only gift is through the direction to pay, *ib.*
- direction to pay after a life interest, *ib.*
- direction to pay at twenty-one, 463
- effect of severance, 464
- effect of gift of intermediate interest, *ib.*
 - interest subject to charges, *ib.*
 - for maintenance, *ib.*
 - till twenty-one, and then the capital, *ib.*
 - till an advanced age and capital not till then, 465
- effect of discretion to apply all or part of interest, *ib.*
- where the gift is a residue, *ib.*
- effect of discretion either to apply interest or accumulate it, *ib.*
- effect of discretion to apply interest not exceeding a fixed sum, *ib.*
- gift of a sum for maintenance out of the personal estate not exceeding the interest, *ib.*
- power to trustees to exclude any legatees from interest, *ib.*, 466
- gift of interest for part of the period before vesting, 466
- where the gift of interest is itself contingent, *ib.*
- gift of interest upon a legacy and upon a fund given to a class, *ib.*
- gift to A. till B. attains twenty-one, and then to B., 467
- effect of a power of advancement, *ib.*
- fact that the gift is of residue favours, *ib.*
- effect of gift over before time of, *ib.*
- effect of a clause of accruer, *ib.*
- effect of gift over upon death without issue upon, 468
 - upon death under twenty-one, without issue, *ib.*
- gift to A. for life, then to children at twenty-one, and if A. dies without issue over, *ib.*
- gift to a class when the youngest attains twenty-one, *ib.*
- whether those dying under twenty-one take anything, *ib.*, 469
- gifts to children who survive their parents, 469—473
 - distinction as to portions between settlements and wills, 469
 - gift to children living at their parents' death is contingent, *ib.*
 - effect of the word "such," *ib.*
 - when it may be rejected, 470
 - gift to children surviving their parents explained by context, *ib.*
 - effect of a direction as to vesting, 471
 - gift over in events not including death of some of the children over twenty-one before their parents, *ib.*
 - gift to a class upon a contingency, *ib.*
 - when the contingency will be imported into the constitution of the class, *ib.*, 472

VESTING—*continued.*

- effect of gift over if none of class survive contingency, *ib.*
- Court will not supply "such" so as to cut down class, 472
- gift after prior interests to persons then living, *ib.*, 473
- gifts in default of appointment, 473, 474
 - where the persons to take under the power and in default are the same, 473, 474
- direction against, of personalty in tenant in tail dying under twenty-one, 485
- gifts over upon death before, 562, 563
 - take effect upon shares of legatees dying before testator, 562
 - refers to vesting in interest, *ib.*
 - where it refers to death before payment, *ib.*
 - where vesting is explained to mean payment, *ib.*, 563
- gift over, if property should vest in another, 508

VIRTU,

- objects of, 165

VIVISECTION,

- whether gift for suppression of, is charitable, 298

VOID,

- gift over, if previous gift is, 506

VOLUNTARY SOCIETY,

- gift to, whether charitable, 296, 297

VOLUNTARY WASTE, 423**W.****WAGES,**

- bequest of a year's, effect of, 228
- of seaman, how disposable, 49

WAIVER

- of conditions by testator, 501

WASTE, 423—431

- creation of estates with and without impeachment of waste, 423, 424
 - voluntary waste, 423
 - tenant in dower and by curtesy, 424
 - fee subject to gift over, *ib.*
 - tail after possibility, *ib.*
 - parliamentary tenant in tail, *ib.*
- rights as regards timber, 424—429
 - tenant for life without impeachment, 424, 425
 - windfalls, 424
 - unripe timber, 425
 - wanton destruction, *ib.*
 - ornamental timber, *ib.*
 - tenant for life impeachable, 426, 427
 - timber for repairs, 426
 - periodical cuttings, *ib.*
 - timber estate, *ib.*

WASTE—*continued.*

- property in timber cut, 427—429
- proceeds of legal waste, 427, 428
- timber blown down, 427
- collusion between tenant for life and remainderman, *ib.*
- proceeds of equitable waste, 428
- effect of Settled Land Act, *ib.*, 429
- timber cut by Court, 429
- rights as regards mines, 429, 430
 - open mines, 429
 - effect of Settled Land Act, *ib.*
- permissive waste, 430, 431
 - tenant for life not liable for, 430
 - effect of direction in will to repair, *ib.*
 - liability to insure and rebuild, *ib.*
 - duty of trustees to repair leaseholds, *ib.*, 431

WASTING SECURITIES,

- duties of executors as to, 377

WAY OF NECESSITY,

- when it passes by devise, 173

WIDOWHOOD,

- gift of income during, 394

WIFE,

- gift to the testator's, 227, 228
- fraudulent assumption of character of, 227
- gift to a third person's, means wife at date of will, 229
 - when second wife included, *ib.*
 - when divorced wife takes, *ib.*
- gift to wife of unmarried person, 230
 - husband and wife and stranger, 231, 232
- not entitled as next of kin by statute, 282
- gift to next of kin of, as if she had survived her husband, 288

WILD'S CASE, RULE IN,

- applies to devise to several and their issue and their heirs, 344
- devise to A. and his children, 345
 - in succession, 346
 - he having none, *ib.*
- child *en ventre* is for this purpose non-existent, *ib.*
- the rule applies, though the parent has a power of appointment, *ib.*
- intention that the parent was not to take an estate tail, *ib.*
- where A. has children at the date of the devise, *ib.*
- the rule does not apply to personalty, 347

WILL,

- what may take effect as, 10—13
- what papers constitute, 31
- what the word includes, 67, 68
- condition not to dispute (see CONDITION), 498, 500

WILLS ACT, at length, 683—689

- s. 1...83
- s. 3...181
- s. 4...181
- s. 6...651

WILLS ACT—*continued.*

- s. 8...24
- s. 10...77
- s. 11...48
- s. 14...27
- s. 15...27, 99, 100
- s. 16...27
- s. 17...27
- s. 22...57
- s. 23...131, 614
- s. 24...104, 199
- s. 25...179, 204
- s. 26...182, 183
- s. 27...197, 199, 204
- s. 28...341, 412
- s. 29...576
- s. 30...363
- s. 31...363
- s. 32...641, 642
- s. 33...642

WINDFALLS,

who is entitled to, 424, 427

WITHOUT HAVING BEEN MARRIED,

construction of, 285, 286

WITNESS ATTESTING

to signature of testator, 26—28
signature by, 29—31
gifts to, 99

WORDS,

changing, 620
supplying, 621, 622

WORLDLY GOODS,

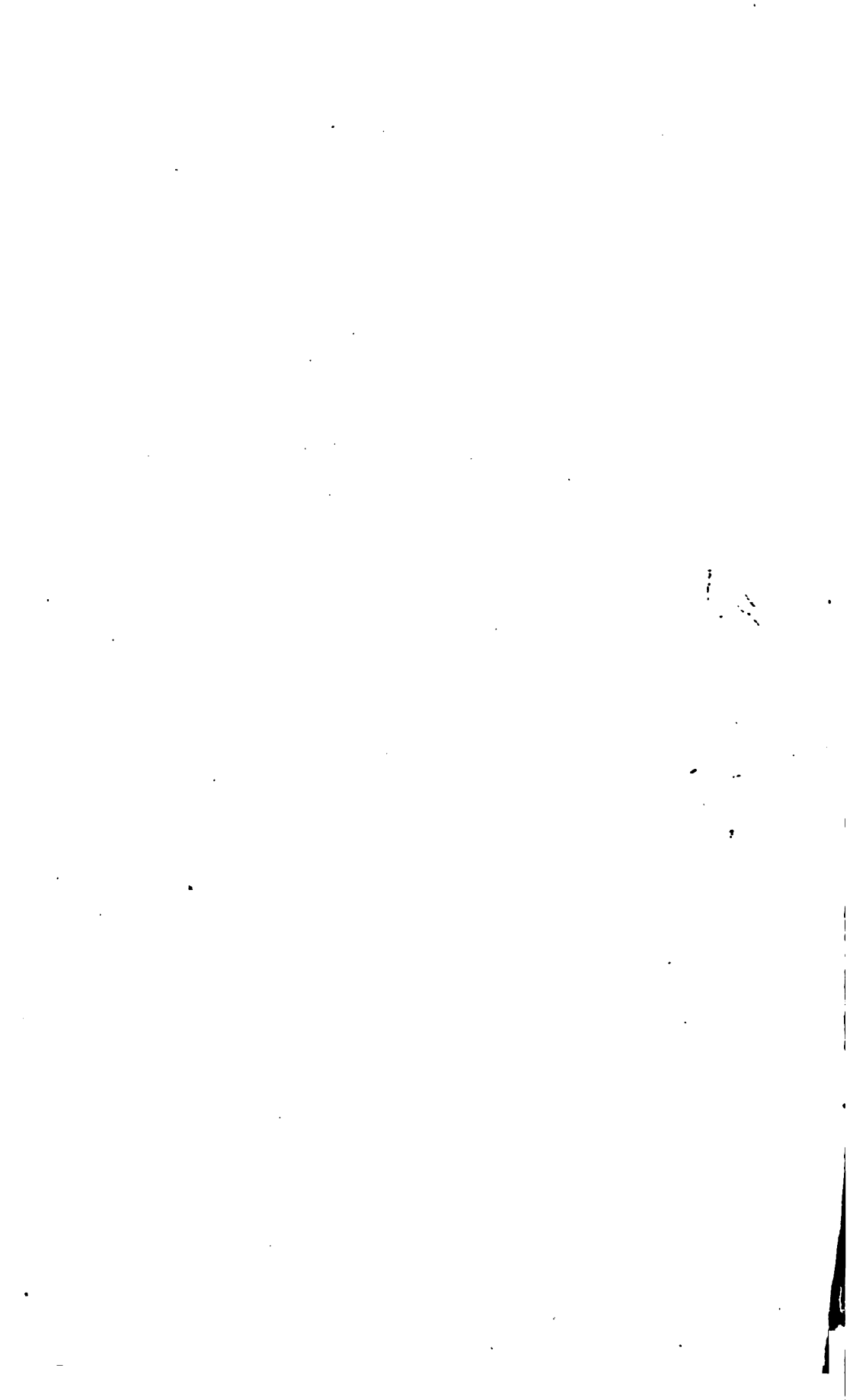
meaning of, 178

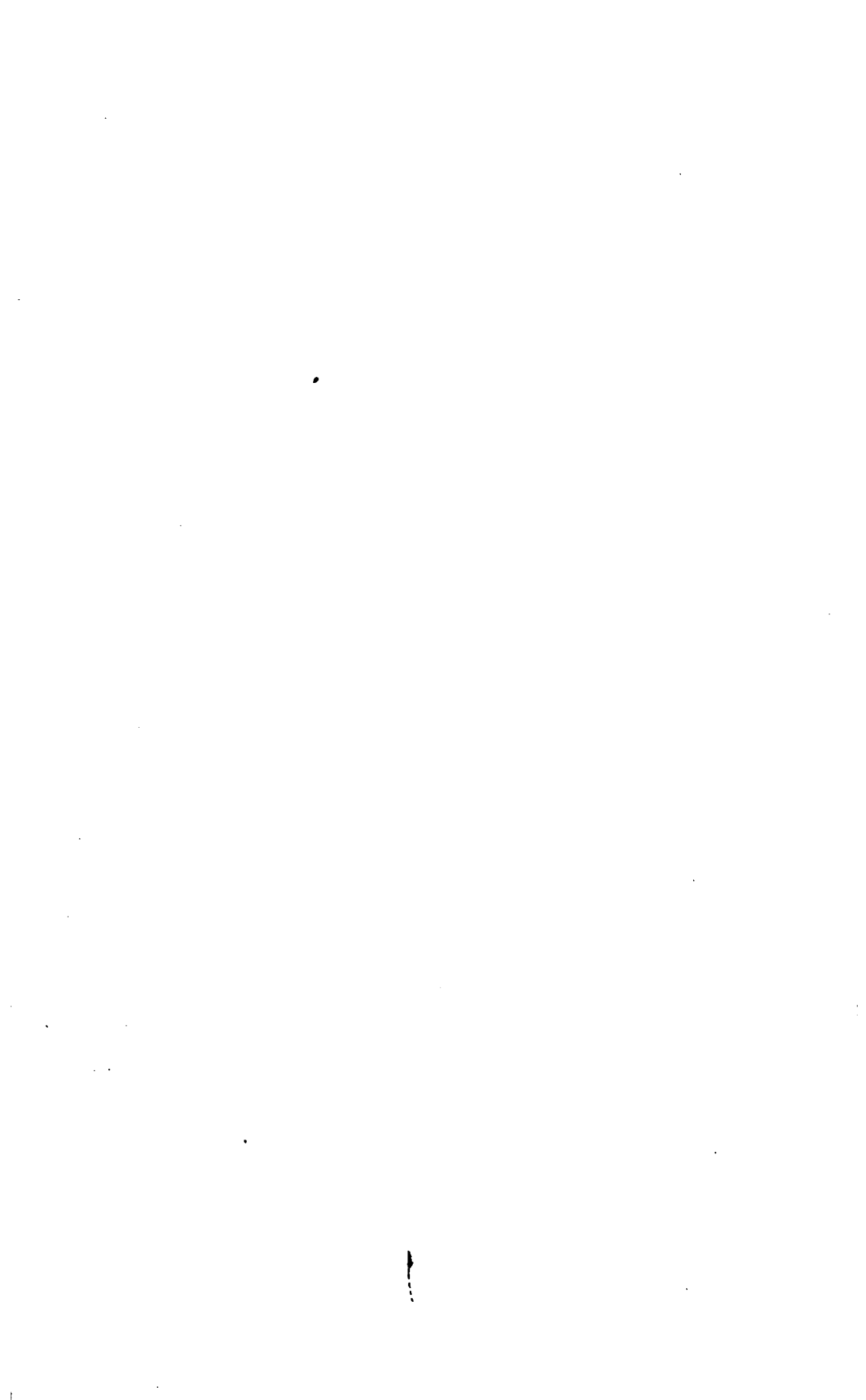
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YOUNGER (see ELDER AND YOUNGER),

meaning of, 233—237
when class of, children ascertained, 234

THE END.





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